

Fit for the Future – Options Analysis

Appendix A

COMMUNITY PROFILE AND STRATEGIC PLANNING

The following section has been prepared to ensure Randwick City Council has undertaken its due diligence relative to local government reform, in accordance with the Council resolution from the 25th November 2014.



Community profile and Strategic planning

Introduction

The following appendix contains strategic observations and analysis on the community and demographic profiling of the Local Government Areas of Randwick, Botany Bay, Waverley Woollahra and City Of Sydney. The Strategic planning section discusses the Global City concept, the Planning Policy framework and a Merger Options Analysis.

The following table outlines the 7 options being analysed and details the current and projected 2031 populations.

Merger option	Council/s	Population (ERP 2013)*	Population 2031**
Option One	Randwick (no change)	142,310	174,300
Option Two	Randwick and Botany	185,602	230,350
Option Three	Randwick and Waverley	213,016	256,450
Option Four	Randwick, Waverley and Botany	256,308	312,500
Option Five	Randwick, Waverley and Woollahra	270,693	323,700
Option Six	Randwick, Waverley, Botany and Woollahra	313,985	379,750
Option Seven	Randwick, Waverley, Woollahra, Botany and Sydney (Global City)	505,903	653,250

Source: *profile.id, Estimated residential population, www.profile.id.com.au

**NSW Department of planning, projected population figures

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Community profile and Strategic planning

1. Community profile

COMMUNITY PROFILE AND
STRATEGIC PLANNING

Appendix

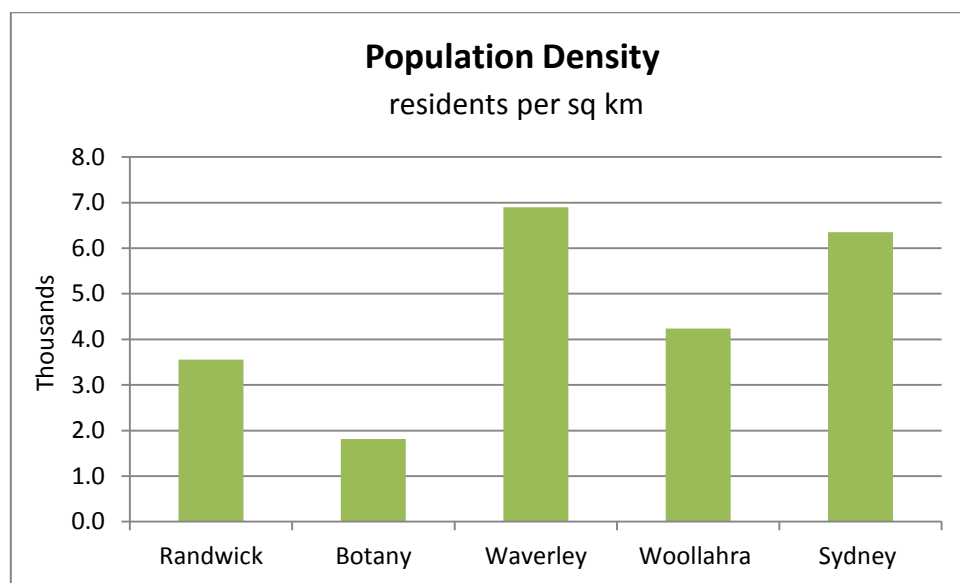
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1. Community profile

This section outlines the profile of the communities in the Randwick, Botany, Waverley, Woollahra and City of Sydney Local Government Areas (LGAs). Data has been sourced from the 2011 Census¹ unless stated otherwise.

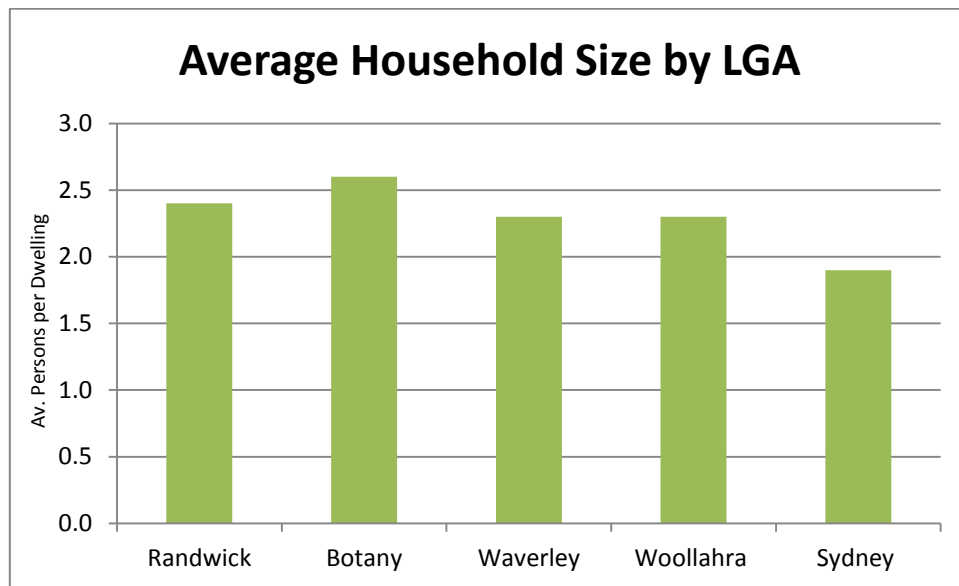
The Census tells us that:

- The Waverley LGA, with a total area of 9.2 sq kms, has the highest density of 6,901 persons per sq km. The City of Sydney (26.7 sq kms) has a population density of 6,349 persons per sq km. Botany (21.7 sq kms) has the lowest density of 1,814 persons per sq km.

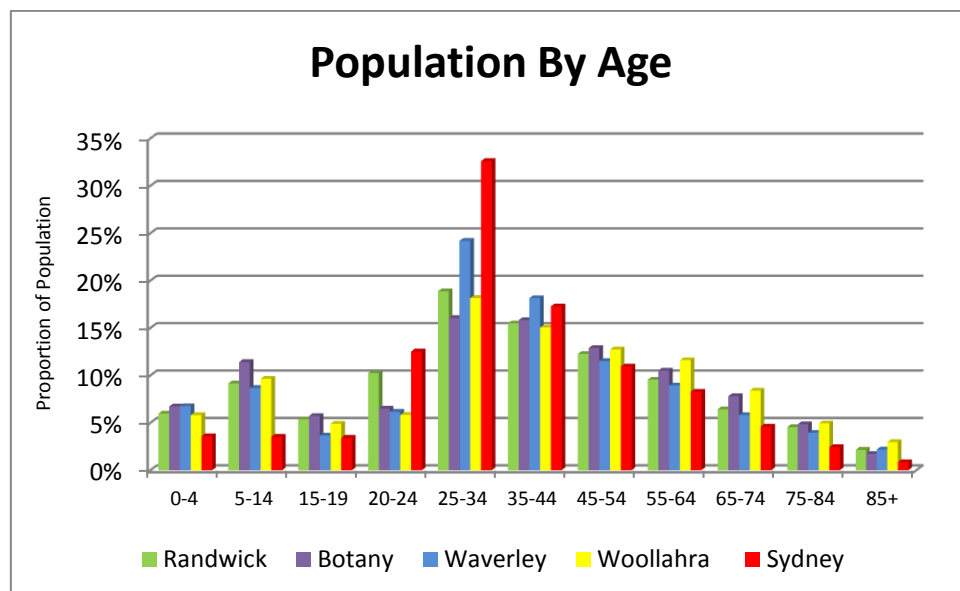


¹ ABS 2011 Census of Population and Housing. Basic Community Profile Based on Place of Usual Residence. Catalogue number 2001.0

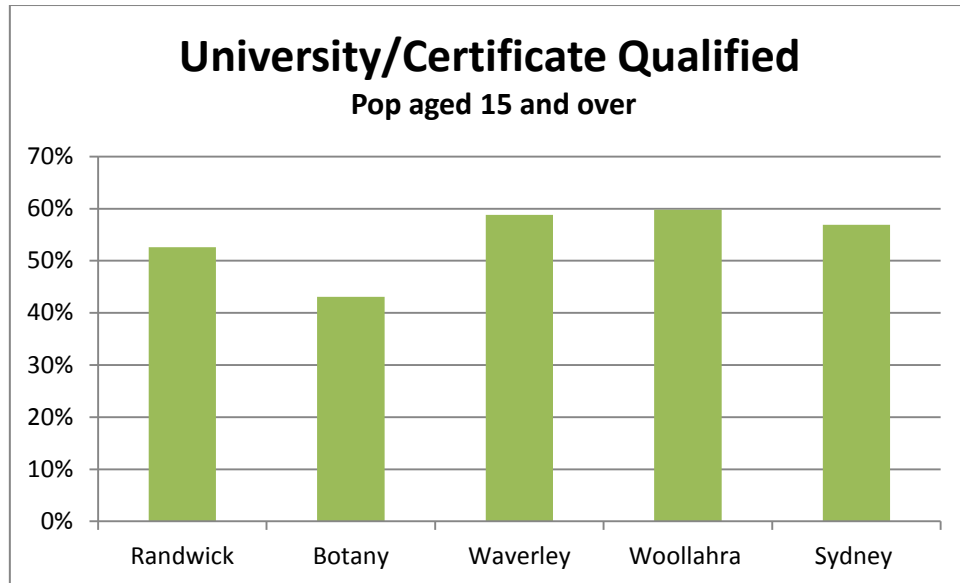
- The number of residents per household is highest in the Botany and Randwick LGAs and smallest in the City of Sydney LGA.



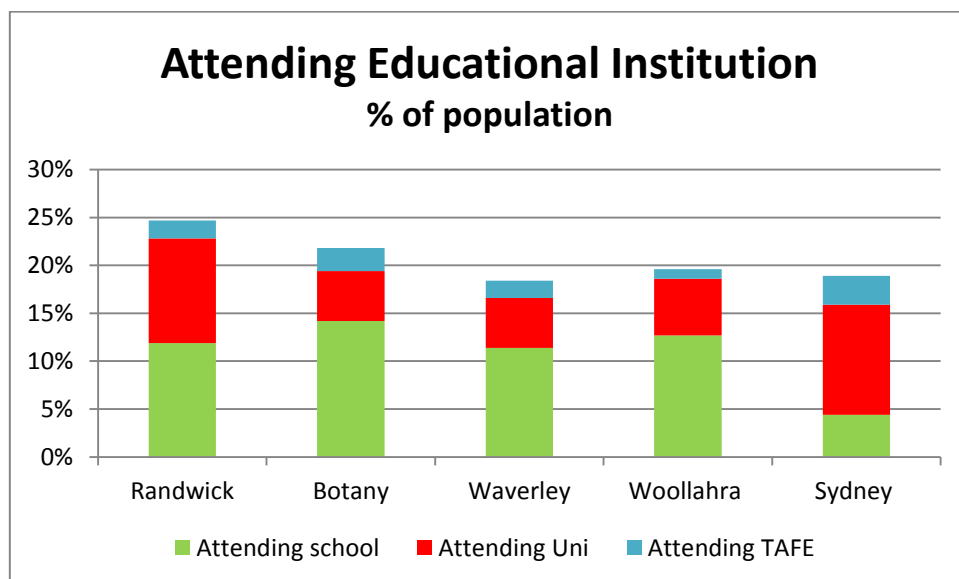
- In all five LGAs, the greatest numbers of residents are aged in the 25-34 year age group, followed by the 35-44 year age group. The City of Sydney has the highest proportion of 25-34 year olds (33%), followed by Waverley. Randwick, Botany and Woollahra have a similar proportion of residents aged in this dominant group (around 17%).
- Waverley, similar to the City of Sydney, has a greater number of 25-44 year old residents than other LGAs.
- The City of Sydney has the lowest proportion of elderly residents (aged 85 year and over) and the smallest proportion of infants (0-4 years).
- Woollahra has the highest proportion of older residents - 65+ years, (16%); followed by Botany (14%). Randwick and Waverley's older resident population are of similar proportions.
- In Botany 18 per cent of residents are under 14 years of age while in Randwick (15%), Waverley (16%) and Woollahra (16%), the proportion aged up to 14 years is very similar.



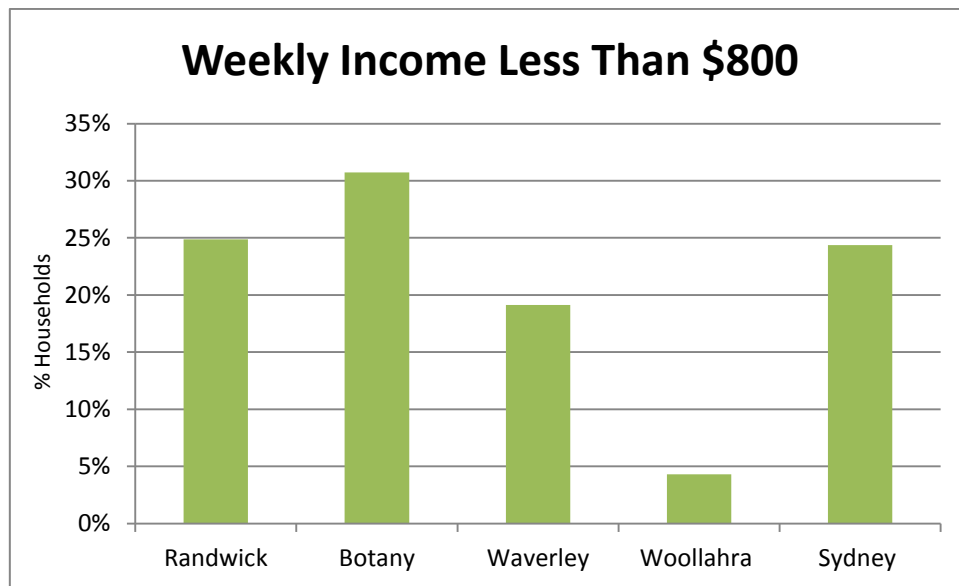
- At least half the population of Randwick, Waverley, Woollahra and the City of Sydney have completed a university degree or a trade certificate. The highest proportion of post-secondary school qualified residents live in Woollahra.



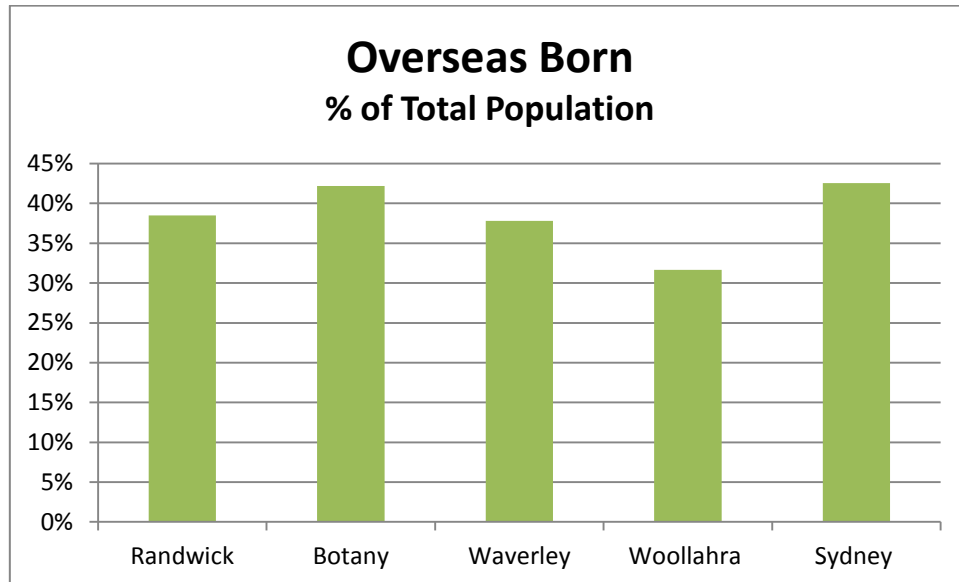
- 14.2% of Botany's residents attend school, compared to 4.4% of the City of Sydney's population.
- 11.5% of the City of Sydney's population attend a university while 10.9% of Randwick's population do so. This reflects the high student populations who reside close to the Universities of Technology, Sydney and NSW. A large proportion of Randwick's population is either attending school, TAFE or University.



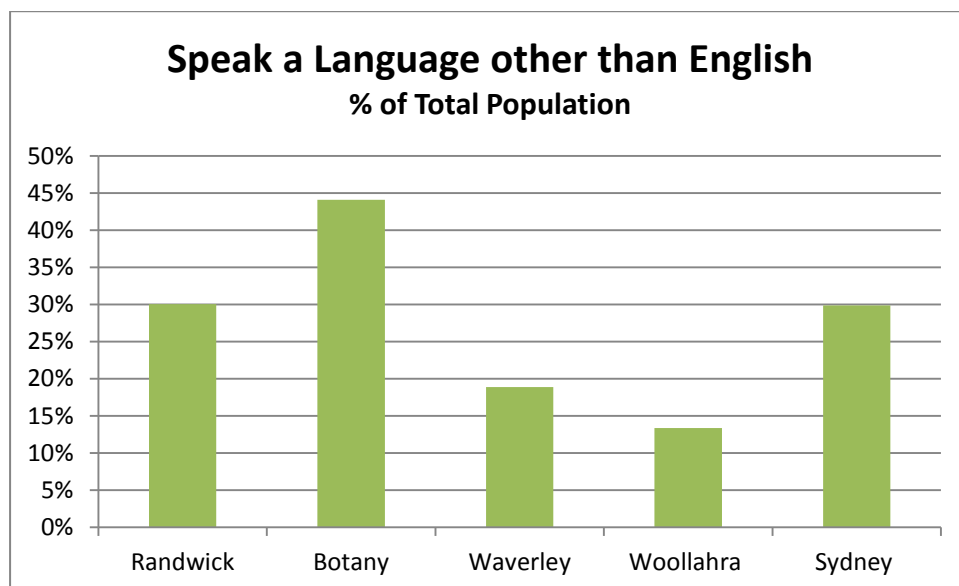
- Around a quarter of residents living in the Randwick, Botany and City of Sydney LGAs earn less than \$800 per week. In Botany the proportion is the highest at 31 per cent.



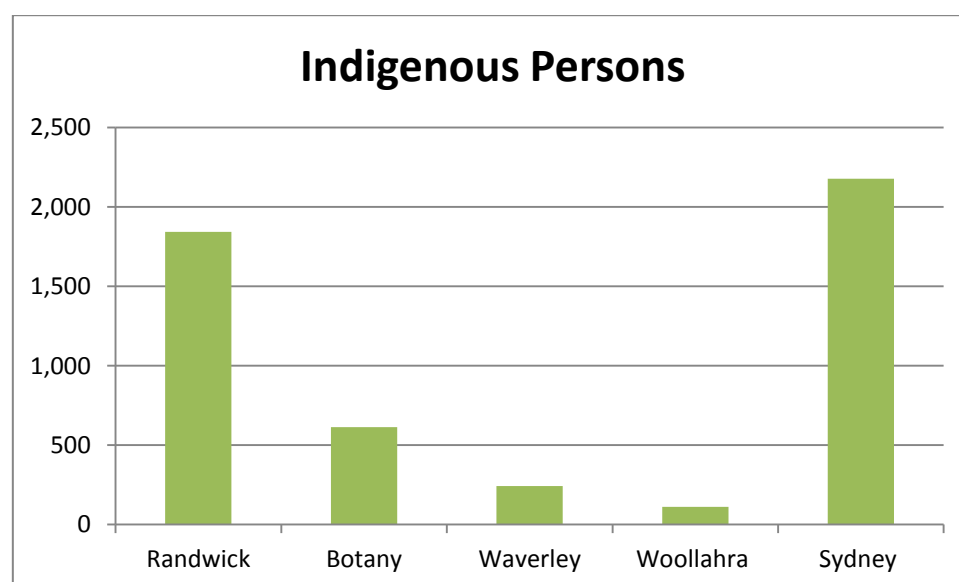
- More than 40 per cent of residents living in the Botany and City of Sydney LGAs were born overseas.



- More than 30 per cent of residents in the Randwick, Botany and City of Sydney LGAs speak a language other than English at home. In Botany the proportion is the highest at 44 per cent.



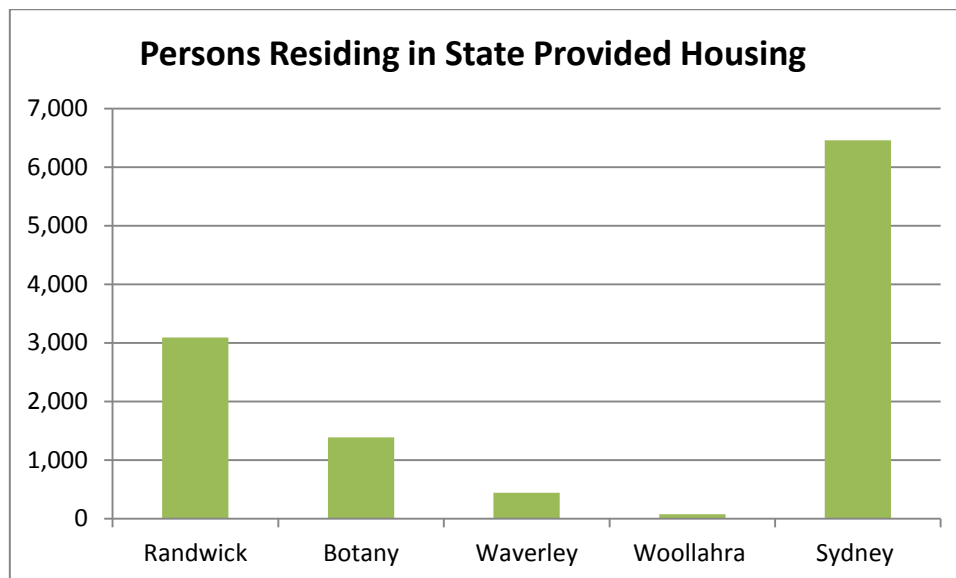
- Around the same number of Indigenous people live in the Randwick and City of Sydney LGAs. However in Botany, the proportion of Indigenous people is the greatest (1.6 per cent), followed by Randwick (1.4 per cent) and City of Sydney (1.3 per cent). Less than 0.5 per cent of the population of Woollahra and Waverley are Indigenous.



- Suburbs to the north of the study area have a lower socio economic disadvantage to those in the south, while in the City of Sydney LGA there tends to be pockets of disadvantage dispersed across the LGA.
- The suburb with the most socio economic disadvantage is Daceyville in the Botany LGA.



Source: ABS 2033.0.55.001 - Socio-economic Indexes for Areas (SEIFA), Data Cube only, 2011



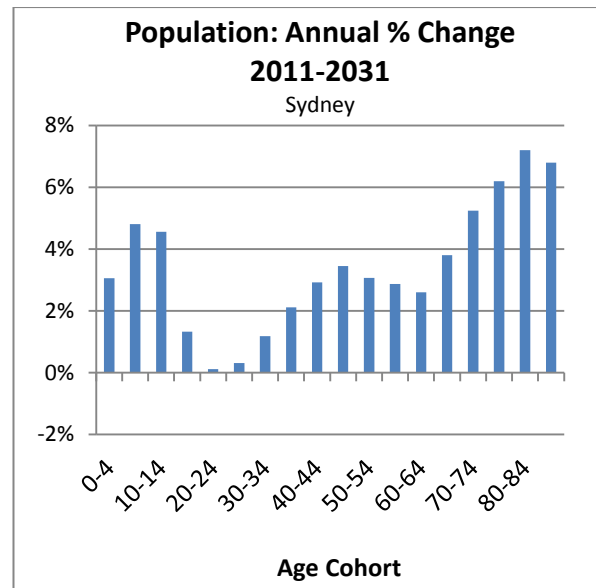
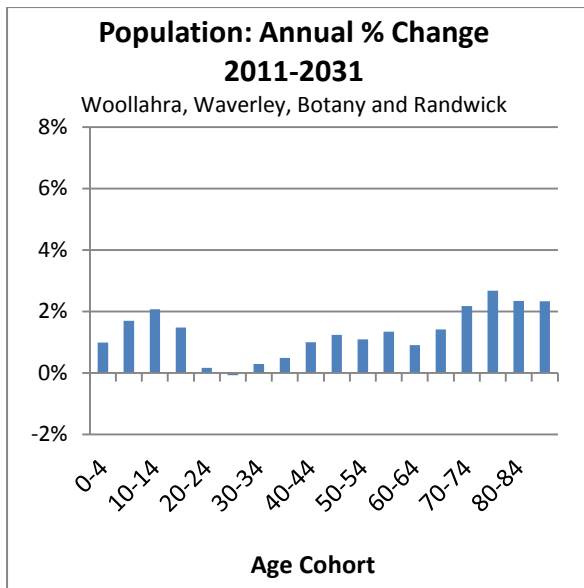
- 6,458 people live in state-provided housing in the City of Sydney LGA which is 3.8 per cent of the population. Of Botany's population, 3.5 per cent live in state-provided housing compared to 2.4 per cent in Randwick; 0.7 per cent in Waverley and 0.2 per cent in Woollahra.

Population Forecasts

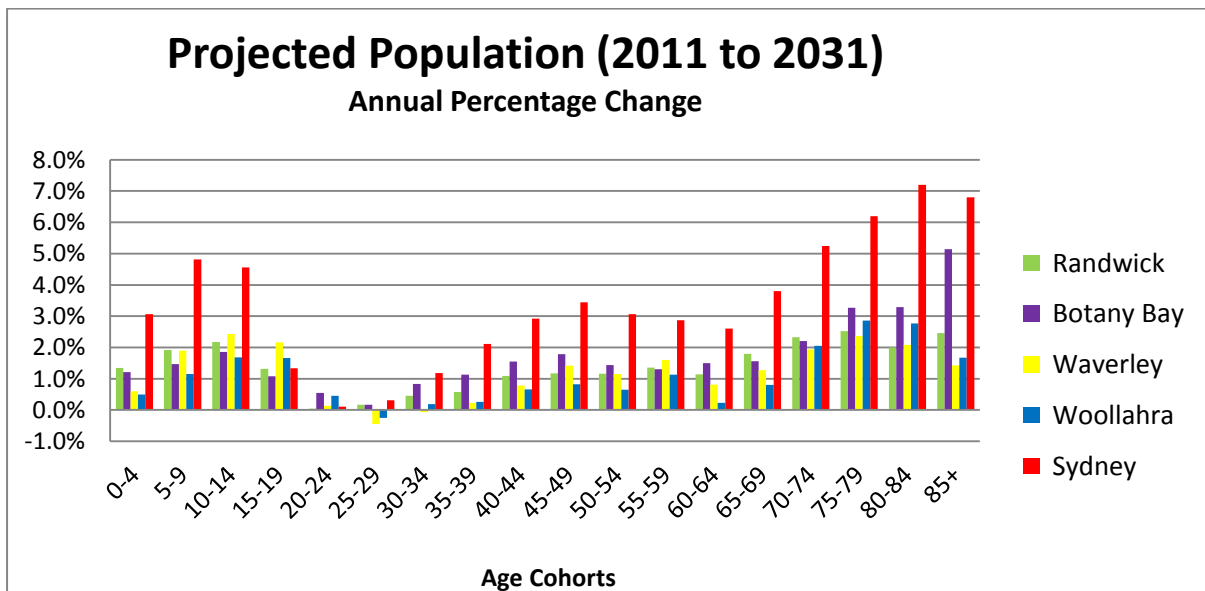
This section will address population trends for the LGAs in the study area, and make some analysis of how projected population growth for City of Sydney might compare with population growth in the combined LGAs of Randwick, Botany, Waverley and Woollahra.

Over the 20-year period 2011-2031 and within the study area, the City of Sydney's population is projected to grow the fastest with a forecast annual growth rate of 2.0 per cent; followed by Botany (1.5 per cent). For the City of Sydney, that growth will be mostly amongst the elderly and the very young. The number of children under 14 years will grow from 12,700 to a forecast 25,000 or by 3.9 per cent, while the population aged 70 and over will grow to a forecast 23,650 (by 14,300 or 6.1 per cent).

The combined population of Randwick, Botany, Waverley and Woollahra LGAs is projected to grow by 1.0 per cent annually until 2031, to reach 379,650 people. The most rapid growth will be in the 75-79 year age group (2.7 per cent), while the number aged between 25 and 29 is forecast to decline by 0.1 per cent.



Source: NSW Planning and Environment. New South Wales State and Local Government Area Population Projections: 2014 Final



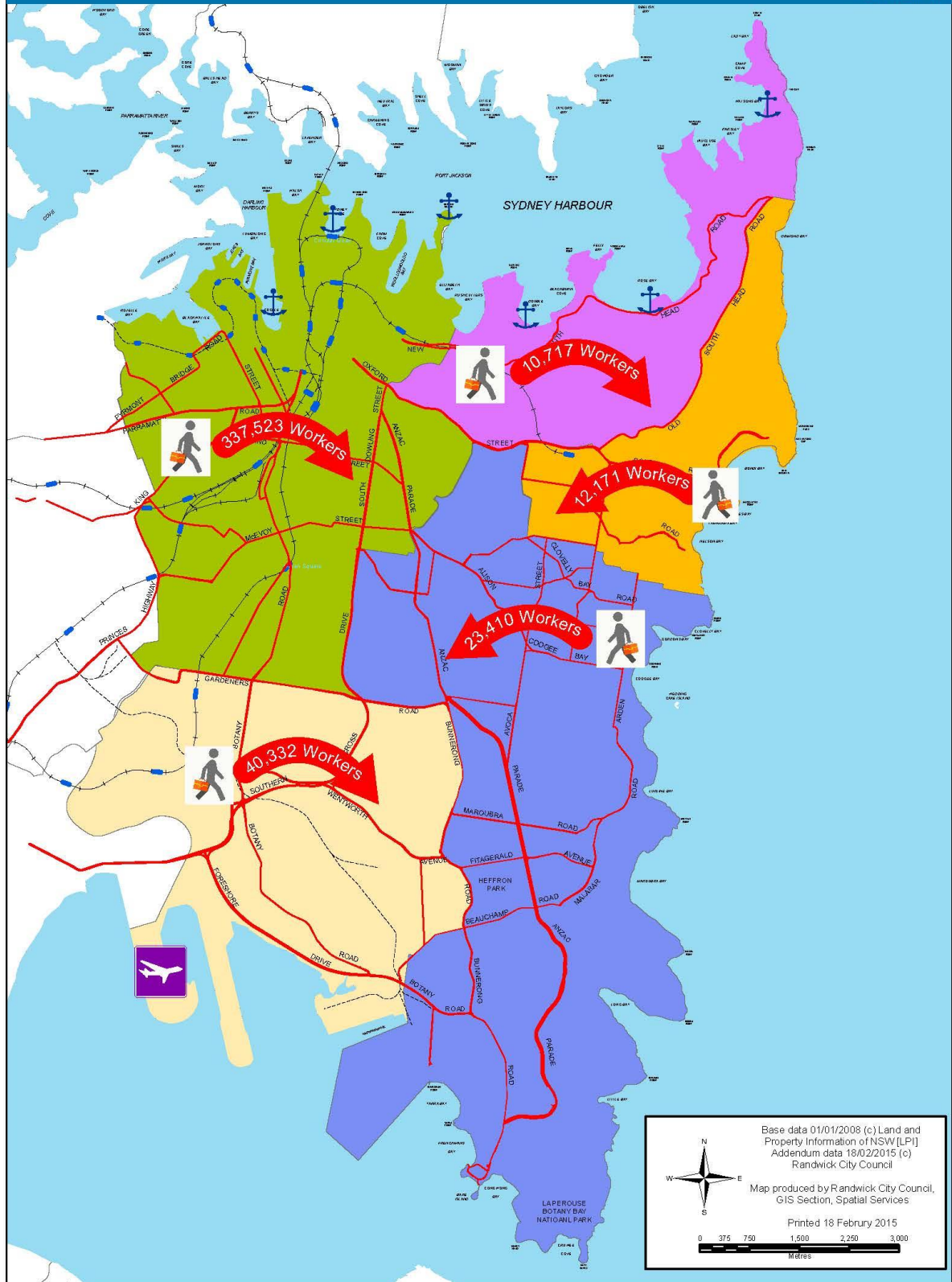
Source: NSW Planning and Environment. New South Wales State and Local Government Area Population Projections: 2014 Final

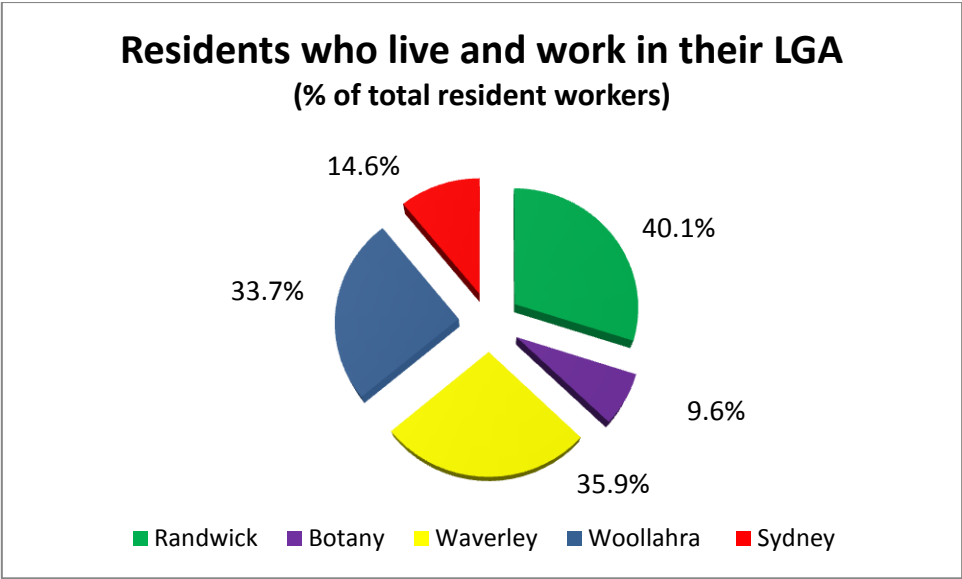
Travel to work

The census data shows that of the Randwick, Botany, Waverley, Woollahra and City of Sydney LGAs, the greatest inflow of workers from other areas is into the City of Sydney (337,523 workers). A little over 40,000 people travel to Botany to work; doubling the size of the resident population (39,356).

Of those who live in the eastern suburbs, there is a strong tendency to work in the same local government area, particularly amongst Randwick residents. Of those who live in Randwick, 40.1 per cent work in Randwick LGA. The trend to work where you live is also strong amongst Woollahra residents (33.7 per cent of Woollahra residents work in Woollahra).

Travel Movements of Non Resident Workers

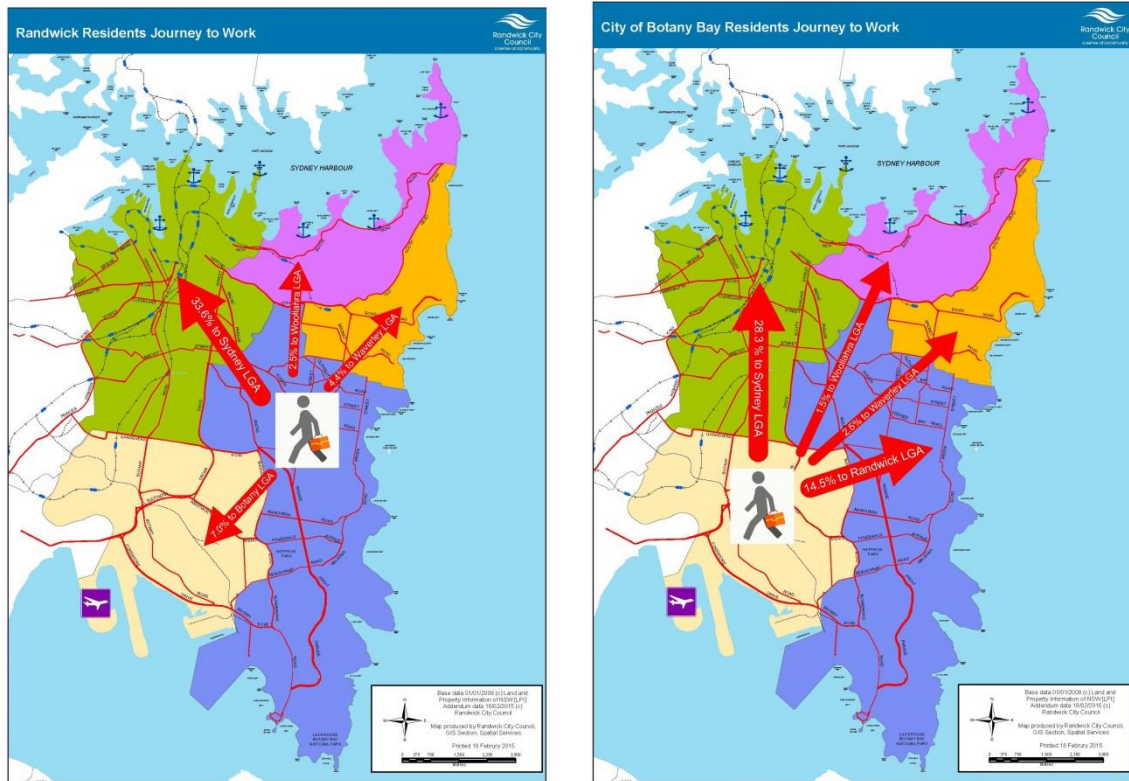




Within the eastern suburbs, there is strong tendency to work locally.

Travel to Work
<ul style="list-style-type: none">• 72.1 per cent of Randwick residents travel to either Botany, Waverley, Woollahra or Sydney City to work• 69.9 per cent of Botany residents travel to either Randwick, Waverley, Woollahra or Sydney City to work• 72.0 per cent of Waverley residents travel to either Randwick, Botany, Woollahra or Sydney City to work• 75.6 per cent of Woollahra residents travel to either Randwick, Botany, Waverley or Sydney City to work• 68.2 per cent of City of Sydney residents travel to either Randwick, Botany, Waverley or Woollahra to work

Within the eastern suburbs there is a strong connection between Randwick and Botany in how residents travel to work. More Botany residents travel to Randwick to work than other eastern suburbs (14.5 per cent), while 7 per cent of Randwick residents travel to Botany to work.



Worker travel movements

Destination →	Randwick	Botany	Waverley	Woollahra	Sydney
Lives in ↓					
Randwick	24.9%	7.0%	4.4%	2.5%	33.6%
Botany	14.5%	23.4%	2.5%	1.5%	28.3%
Waverley	4.7%	2.4%	20.1%	5.4%	26.1%
Woollahra	3.1%	2.0%	5.1%	20.5%	45.4%
Sydney	2.6%	2.6%	1.6%	1.8%	60.6%

Source: Australian Bureau of Statistics, Census of Population and Housing 2011. (Usual residence data) Employment location of residents by SLA

Leisure Related Travel Movements

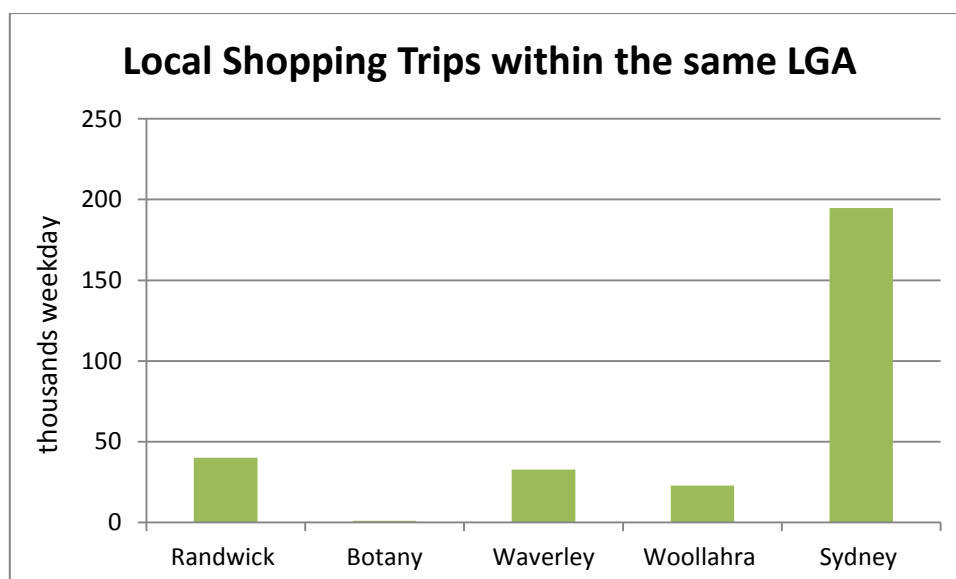
From within the Greater Sydney Metropolitan Area (GMA), the most trips² to the study area for social and recreation are to the City of Sydney. Trips to Botany (which include trips to the Kingsford Smith Airport as a departure point for both international and domestic holidays) are only marginally higher than trips to the Randwick LGA.



Source: NSW Bureau of Transport Statistics, Household Travel Survey 2012/13

Local shopping Travel Movements

Given the range of retail centres spread throughout the area, it is not unexpected that the tendency to shop locally is strong amongst residents in the City of Sydney. What is significant is the tendency for Randwick residents to shop locally given the lack of major commercial centres in the area. The tendency to shop locally is also strong in Waverley, though most trips are likely to be centred on Westfield in Bondi Junction.



Source: NSW Bureau of Transport Statistics, Household Travel Survey 2012/13

² Weekday trips in Sydney Greater Metropolitan Area by car, train, bus, ferry, bicycle, and walking.

Observations

The populations of the Randwick and Botany LGAs share a very similar age profile. While Randwick has a slightly smaller proportion of children under 14 years of age and a slightly higher proportion of 20-34 year olds, the profile is remarkably similar otherwise. These differences are expected to balance out over the next twenty years with the number of children increasing at a slightly faster rate in Randwick than in Botany, while the number of 20-34 year olds in Botany will outpace growth in this group in Randwick.

The population in Botany is expected to age at a faster rate than in Randwick.

Waverley and the City of Sydney have a higher proportion of 25-34 year olds than Randwick, Botany and Woollahra and are characterised by young singles and childless young couples.

Waverley and the City of Sydney have a lower ratio of children to adults of parenting age compared to Randwick, Botany and Woollahra. In Waverley and City of Sydney the ratio of adults of child-bearing age (25-44 years) to children (0-19 years) is 0.45 and 0.21 respectively. The ratios for Botany, Woollahra and Randwick are 0.75, 0.61 and 0.60 respectively.

Mirroring the younger demographic makeup of the community, more than 10 per cent of eastern suburbs residents are attending infant, primary or secondary school compared with less than 5 per cent of City of Sydney residents.

With multiple higher education institutions located within Randwick and City of Sydney, both LGAs have significantly higher post school student population numbers than Botany, Waverley and Woollahra.

There is greater ethnic diversity in Randwick and Botany with more than 30 per cent of residents speaking a language other than English at home than in the northern neighbours of Waverley and Woollahra. Similarly in the City of Sydney LGA another language other than English is spoken in around 30 per cent of households. While the proportion born overseas living in Botany and Waverley is about the same, the lower proportion of residents who speak another language other than English at home indicates Waverley is moderately rather than highly diverse.

The proportion of Indigenous is highest amongst the populations of Botany, Randwick and the City of Sydney.

Suburbs to the north have a lower socio economic disadvantage ranking to those in the south, while in the City of Sydney LGA there tends to be pockets of disadvantage dispersed across the LGA. In Randwick and Botany there are indications of greater socio economic hardship. More than 25 per cent of households earn less than \$800 per week. In contrast fewer than 20 per cent of households in Waverley are defined by this measure of socio economic hardship. Households in Woollahra are amongst the highest income earners in NSW.

The suburb with the highest socio economic disadvantage is Daceyville in the Botany LGA.

Each day more than one-quarter of a million people travel to the City of Sydney LGA to work. Nearly half of Woollahra's residents, one-third of Randwick residents, and around one-quarter of Waverley and Botany residents, travel daily into the City of Sydney to work.

More Randwick residents travel to Botany to work than to Waverley and Woollahra combined, while the number of Botany residents who travel to Randwick to work greatly outnumber those who travel to Waverley and Woollahra combined.

A greater number of Sydney City dwellers are employed in Randwick (2.6%) and Botany (2.6%) while fewer travel to Waverley (1.6%) and Woollahra (1.8%) to work.

Just as there are a significant number of Randwick residents who work in their LGA and therefore do not travel far to work, a significant number of residents also shop locally.

Significant numbers of people travel to the study area for recreational and social pursuits.

City of Sydney

The City of Sydney's integrated planning documentation makes numerous references to planning for cluster developments which is reinforced by multiple references across interlinked documents. The application of cluster development logic reflects the dominance of population density as a factor in planning. In contrast large parts of the southern suburbs of the Randwick and Botany LGAs are of low density; making access and equity greater considerations in planning service provision.

'...The plan is about the CBD as a city centre supported by a series of thriving interconnected village economies and communities' (Sustainable Sydney 2030 Community Strategic plan (2014))

'...the City of Sydney local government area has been divided into ...nine planning districts which generally follow the zones developed for the Local Action Plan project.' (Open Spaces and Recreation Needs Study, Volume 1, March 2007)

Community profile and Strategic planning

2. Strategic planning report

COMMUNITY PROFILE AND
STRATEGIC PLANNING

Appendix

A

This section discusses the concept of the 'global city' and how it applies to Sydney, the greater metropolitan area and specifically, the group of councils subject to this report. The new metropolitan plan for Sydney - '*A Plan for Growing Sydney*' - focusses on making Sydney a strong global city and a great place to live. This section provides an overview of key actions in the new metropolitan plan that have a direct impact on the future planning for the group of councils. Other key strategies and action plans of the NSW Strategic Planning framework with relevance to land use planning in this region are also discussed.

2.1 The Global City

The Global City concept

The term "global city" was first introduced by Professor Saskia Sassen in the 1991 book, '*The Global City*'. Sassen (1994, 2001) describes global cities as 'the command and control posts³ of the integrated world economy, home to transnational corporations, banks, financial, information and specialised service companies and international organisations of all kinds. To sum up, global cities are the decision places and production places of finance and highly specialised producer servicesⁱ. They are important nodes in the global economic system.

Infrastructure NSW in the State Infrastructure Strategy (2012) states that 'the 'global city' concept refers to those metropolises that have the greatest social and economic impact on the world. These cities are characterised by their political and cultural influence, role in world trade and global financial flows, and their attractiveness to tourists and globally mobile employees. Global cities are highly connected to the rest of the world and are attractive to people in the high value and strongly influential knowledge-based industries. Global cities typically have a strong presence in the research and development space and place a premium on liveability, environment and accessibilityⁱⁱ'.

To be called a global city means that activities and ideas stemming from the city have the ability to shape the worldⁱⁱⁱ.

A number of organisations around the world have developed their own rankings that measure cities across a diverse range of social, economic, environmental and cultural indicators. These rankings attempt to quantify cities in terms of their global status and influence, which provides an understanding of how a city such as Sydney is positioned against other cities around the world.

While there appears to be no single, generally accepted definition of what constitutes a global city, there are a number of common attributes that current literature ascribes to global cities. These attributes combine to integrate a city into the global network. Generally, these attributes, according to the Global Cities Index⁴ include:

³ Two main types of companies exercise global command and control functions from Sydney. The first is Australian-owned firms which have started producing in, or exporting to, other countries. The second is foreign-owned firms which exercise significant sub-global command and control through their regional headquarters in Sydney (Searle 1996)

⁴ A.T Kearney Global Cities Index, the Global Cities Index ranks cities' metro areas against five economic, cultural, social, and policy indicators

1. Business activity - including the value of its capital markets, the number of Fortune Global 500 firms headquartered there, and the volume of the goods that pass through the city.
2. Human capital - how well the city attracts diverse groups of people and talent. This includes the size of a city's immigrant population, the number of international schools, and the percentage of residents with university degrees.
3. Information exchange - how well news and information is dispersed about and to the rest of the world. The number of international news bureaus, the amount of international news in the leading local papers, and the number of broadband subscribers.
4. Cultural experience - or the level of diverse attractions for international residents and travellers. That includes everything from how many major sporting events a city hosts to the number of performing arts venues it boasts.
5. Political engagement - measures the degree to which a city influences global policymaking and dialogue. This is done by examining the number of embassies and consulates, major think tanks, international organizations, sister city relationships, and political conferences a city hosts.

Geographically, a global city refers to a metropolitan area such as the Sydney Metropolitan Area or an urban region rather than a central city. The central city and its surrounding region need each other. They form an organic whole to make a global city^{iv}. The concept of a global city is however 'tied more closely to function than size'^v. Today, the most important cities are not necessarily the largest cities in terms of population; it is their economic vibrancy and influence which defines them. In this context, a city's influence can be viewed as the extent to which the ideas it generates are adopted by other cities. Size helps, but size does not ensure a city has influence^{vi}.

In essence, globally integrated cities are intimately linked to economic and human development. By creating an environment that spawns, attracts, and retains top talent, businesses, ideas, and capital, a global city can generate benefits that extend far beyond municipal boundaries^{vii}.

Sydney as a Global City

The process of Sydney's rise as a global city has involved multi-dimensional economic restructuring and industrial changes. These include the industrial shift from manufacturing to post-industrial information economy; the changed employment structure, global command and control functions, finance sector, and international economic connections; and the emergence of a knowledge-based economy^{viii}.

Today, Sydney is Australia's leading global city^{ix}. It is Australia's financial and economic capital^x and is home to the Australian Stock Exchange and the Futures Exchange. Sydney is also home to the country's highest number of head offices for international institutions and foreign banks. It is an important cog in the national and international economy, linking Australia with the world through business transactions, knowledge sharing, and people movement. These links allow Australia to compete in an integrated world economy through Sydney and its other global cities^{xi}.

Based on these links, Sydney is considered an alpha+ world city⁵ and is ranked in the top 10 most connected cities alongside New York, London, Tokyo, Paris and Hong Kong. Alpha cities in general have critical links with major economic regions and states that are linked to the world economy.



Source: 'The World of alpha Cities' Globalization and World Cities (GaWC) Research Network

Sydney's status as a global city is also reflected by its high concentration of knowledge-intensive industries, its skilled workforce, and capacity to innovate. Such attributes define the competitiveness of global cities, and determine Sydney's positioning in the global city hierarchy^{xii}.

Sydney is also ranked number one in several key indicators measuring 'quality of life', 'sustainability and the natural environment' and 'demographics and liveability'^{xiii}. Sydney is also the world's most popular city to study⁶.

It is this desirability that Global Sydney attracts more than business. It attracts people from across Australia and the world for career, training, and lifestyle opportunities. They are valuable human capital for Sydney's capacity to innovate and compete in the world economy^{xiv}.

Geographically, the definition of Sydney as a global city also varies. Global Sydney is often referred to as the Greater Sydney region made up of 41 local government areas (ANZSOG institute for Governance; and PriceWaterHouseCoopers (2010, 2014)). Infrastructure NSW in the State Infrastructure Strategy defines Global Sydney geographically, as the economic and cultural corridor that runs from Macquarie Park through North Sydney and the Sydney CBD to the Port and Airport Precinct which is referred to as the Global Economic Corridor. This is discussed in further detail below. The local government areas (LGAs) that make up the Global Sydney area (according to Infrastructure NSW) are: City of Sydney, Waverley, Willoughby, Woollahra, Ashfield, Botany Bay, Burwood, Canada Bay, Ryde, Strathfield, Hunters Hill, Lane Cove, Leichhardt, Manly, Marrickville, Mosman, North Sydney and Randwick^{xv}.

⁵ according to Loughborough University's globalisation and world cities research network which measures the connectivity of cities in terms of position and influence

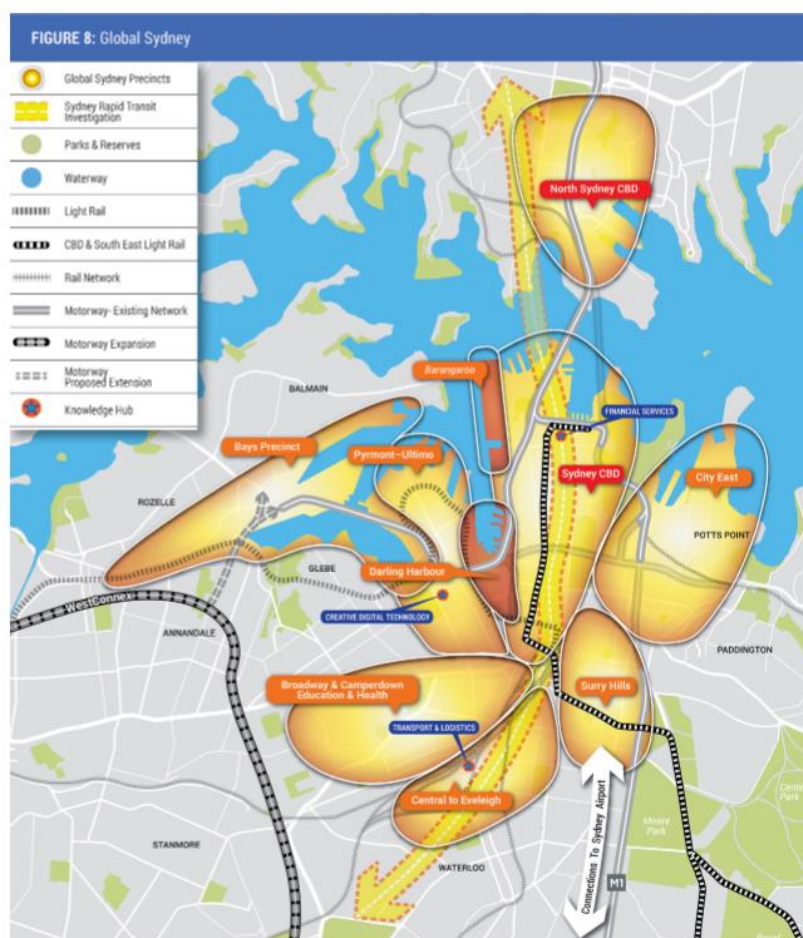
⁶ according to the A.T. Kearney 2014 Global Cities Index.

A report by the then Department of Urban Affairs and Planning in 1996 titled 'Sydney as a Global City' noted the central business district (CBD), North Sydney and other inner areas, particularly on the north shore were the focus of the main global activities in Sydney'. Since then, planning in the central city and strategic locations became attached to the production of a globally competitive city^{xvi}.

The concept of Global Sydney has also been used in strategic plans for Sydney for at least 10 years now.

In *City of Cities: A Plan for Sydney's Future* (2005), Global Sydney is defined as being made up of Central Sydney and North Sydney. In the draft *Sydney City Subregional Strategy* (2008), Global Sydney is defined as being made up of Central Sydney and North Sydney.

The recently released metropolitan plan for Sydney *A Plan for Growing Sydney* (2014) also defines 'Global Sydney' as being made up of 'Sydney CBD and adjacent precincts, including North Sydney'^{xvii}, see map below. This plan focuses on strengthening the global competitiveness of Sydney as it applies to the Sydney metropolitan area⁷ not just the City of Sydney LGA and it makes development of strategic locations across Sydney a priority, including the Sydney CBD, the Global Economic Corridor, Greater Parramatta and Sydney's gateways – the port and airports^{xviii}.



Source: 'Global Sydney' as defined by 'A Plan for Growing Sydney'

⁷ Sydney Metropolitan Area is the 41 Local Government Areas to which 'A Plan for Growing Sydney' applies, from Pittwater in the north, Blue Mountains in the west, to Wollondilly in the South

Global Economic Corridor

A key component of strengthening the economic competitiveness of metropolitan Sydney is the Global Economic Corridor (GEC). The Global Economic Corridor (GEC), is an arc of intensive economic activity stretching from Port Botany and Sydney Airport to Macquarie Park (and is now extended) to Parramatta, Norwest and Sydney Olympic Park^{xxix}, as shown in Figure 1.1. It generates over 41 per cent of the NSW Gross State Product (GSP)^{xx}.

Sydney's knowledge jobs are heavily concentrated within the Global Economic Corridor, including sectors such as education, financial and other business services^{xxi}.

At Macquarie Park there is a high concentration of IT and pharmaceutical sector leaders, as well as Macquarie University. The Sydney CBD and North Sydney area is the hub of the banking, financial services, insurance, funds management and superannuation industries in Australia^{xxii}. While the area south of the Sydney CBD and including the port and the airport contains a mix of transport, manufacturing, retailing, warehousing and variety of service sector activities (as well as new residential development)^{xxiii}.

This economic cluster or agglomeration⁸ is unique in Australia due to the extent, diversity and concentration of globally competitive industries. It is a dynamic zone of agglomeration, where large numbers of firms are located close to each other, whether planned or evolutionary. Key benefits of agglomeration include access to a large pool of skilled workers and sharing of ideas^{xxiv}.

⁸ Agglomeration refers to the density and/or spatial size of economic activity (SGS submission to the draft metropolitan strategy of Sydney 2013 pg. 9)

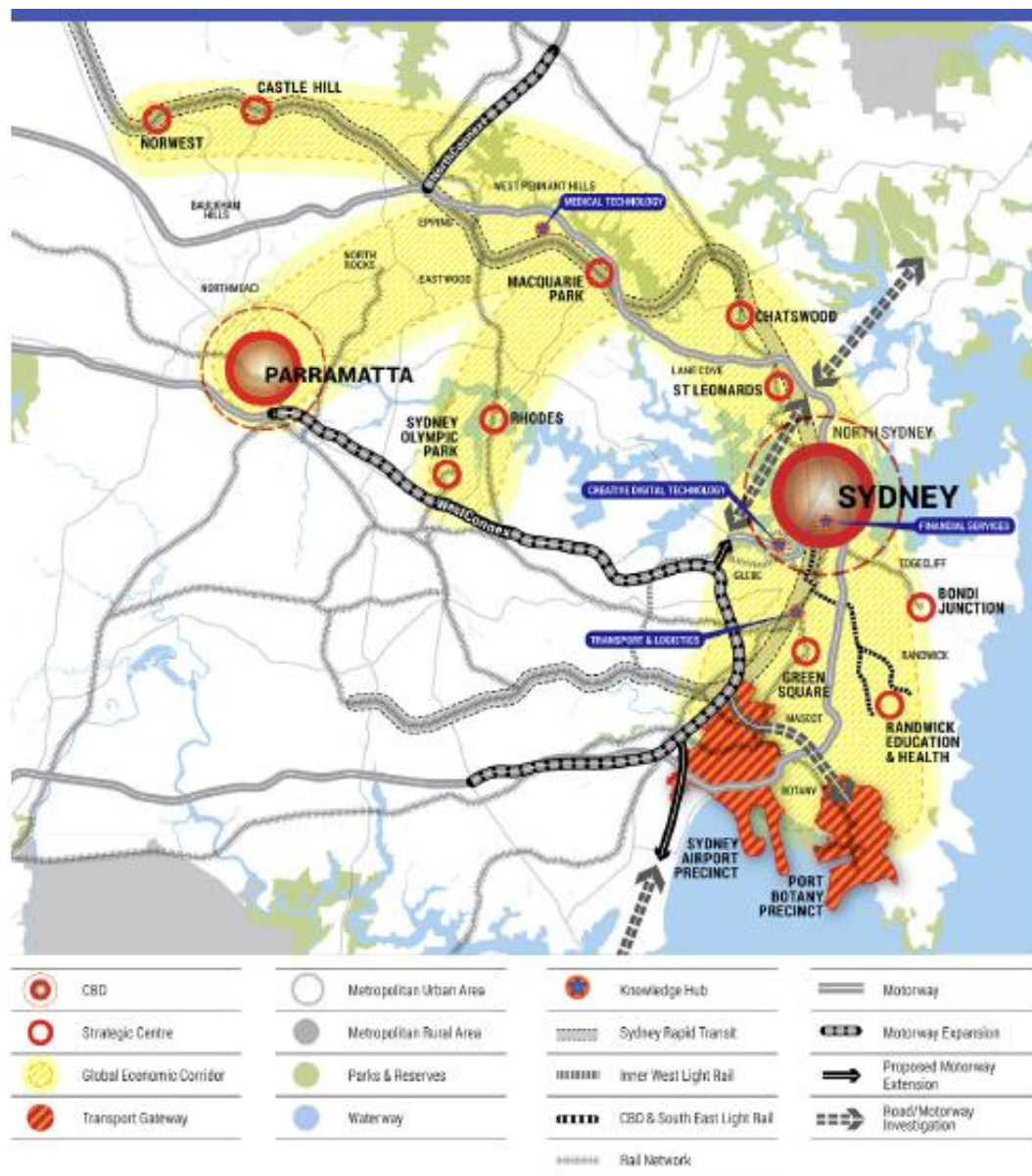


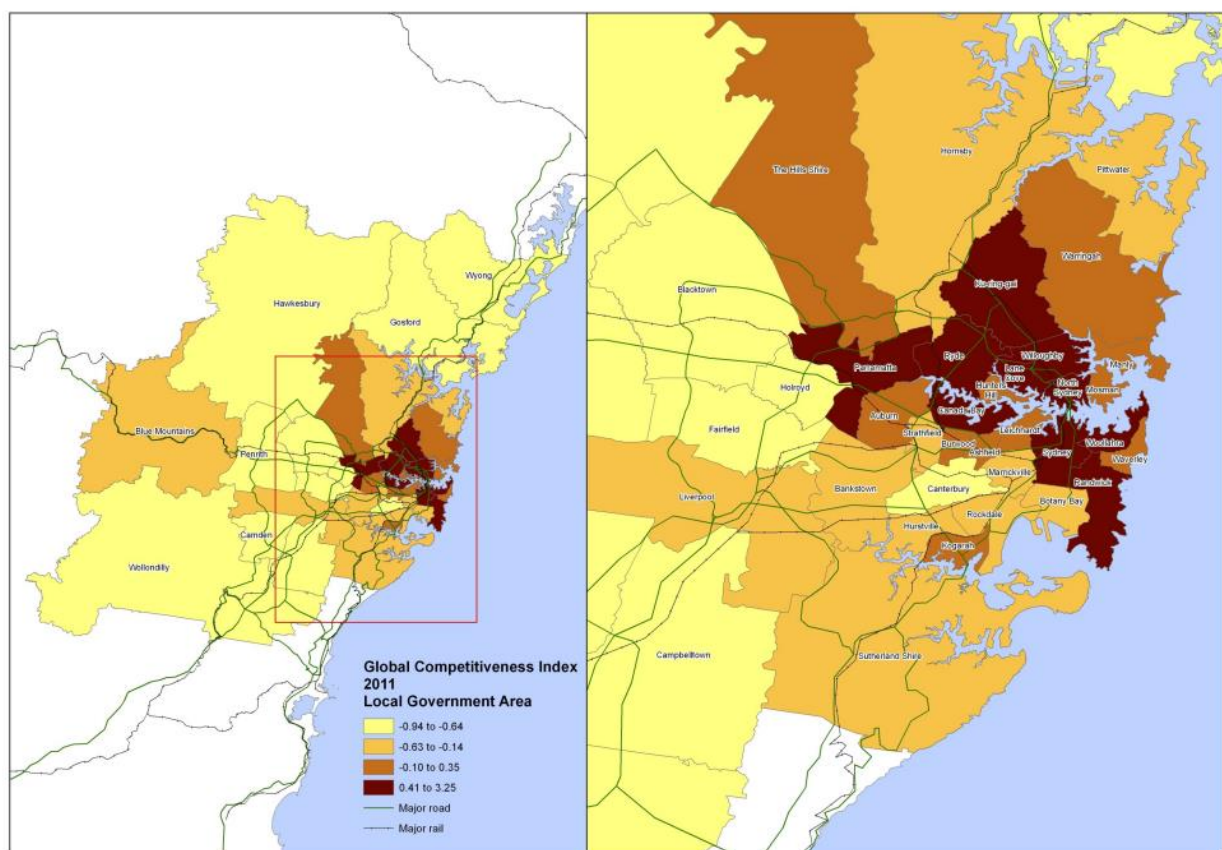
Figure1.1: The Global Economic Corridor Source: A Plan for Growing Sydney

The Global competitiveness of the region [Randwick City Council, Botany Bay Council, Woollahra Council, Waverley Council and the City of Sydney Council]

At the local government level, researchers from the ANZSOG Institute for Governance at the University of Canberra, and the Commonwealth Department of Immigration and Citizenship (DIAC) have developed a Global Competitiveness Index (GCI)⁹ for each local government area in Sydney.

The index shows where industries and occupations of high importance to global cities are concentrated within the Sydney metropolitan region. It measures a community's capacity of global services in terms of knowledge-intensive industries, highly-skilled occupations, higher levels of qualifications and median income^{xxv}. The results illustrate that high-ranking council areas (Sydney's economic movers) are located within and close to the Global Economic Arc^{xxvi}.

Global Competitiveness Index (GCI), LGAs across the Sydney region 2011



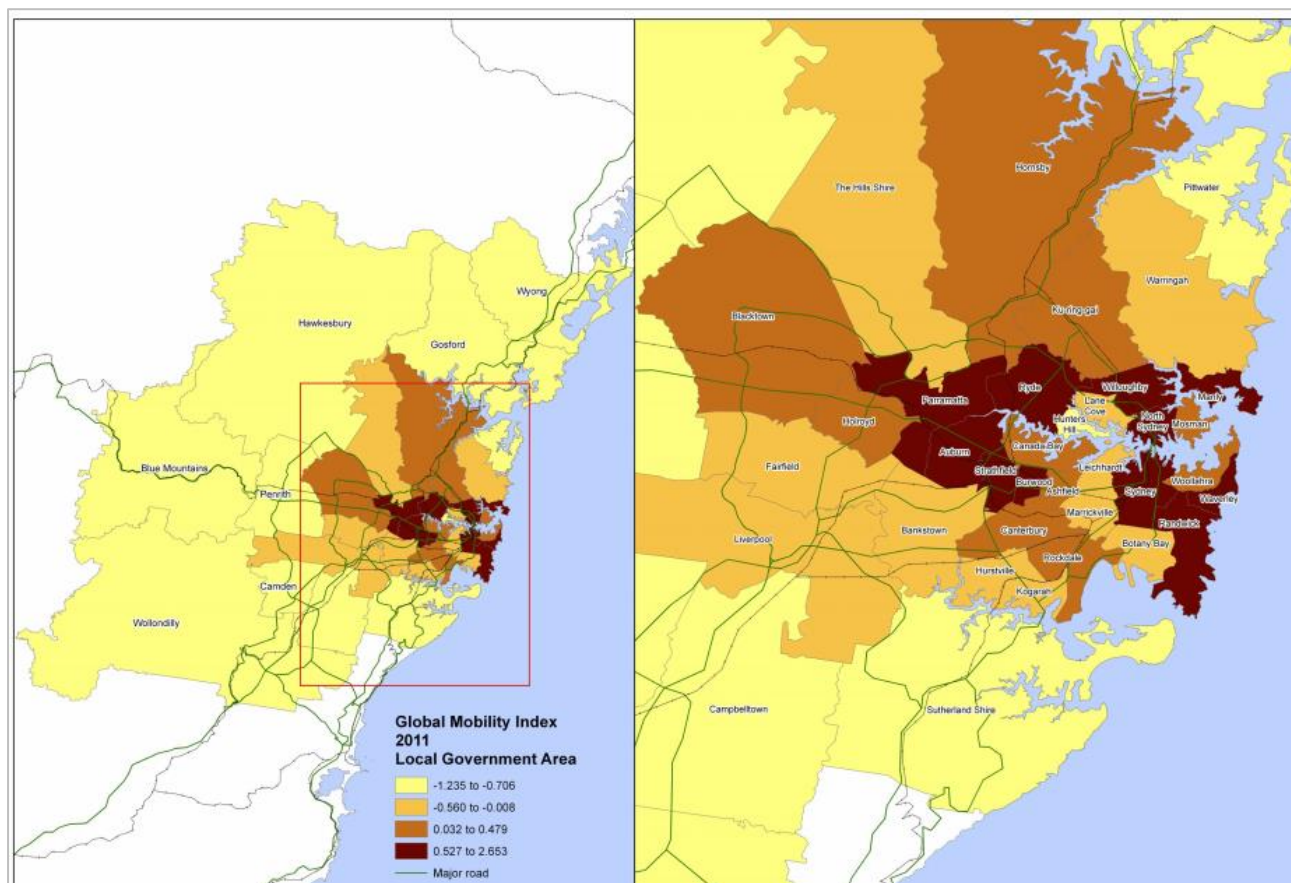
Source: *Globalization and Cities Research Program, University of Canberra*

Sydney's rise as a global city is closely associated with its growing migration^{xxvii}. Similarly to the Global Competitiveness Index, is the Global Mobility Index 'GloMo' which looks at Sydney's ability to attract and retain migrants from Australia and overseas. This has been done by comparing the inward migration patterns of residents in each of the Sydney region's Local Government Areas

⁹ The GCI is a weighted index that considers the following indicators based on place of work: workers in knowledge-intensive industries; workers in highly-skilled occupations; workers with a university qualification; and workers' income.

(LGAs) in 2006 and 2011. The City of Sydney was a clear leader in the GloMo for both 2006 and 2011 with Randwick as the second highest-rating LGA in both 2006 and 2011^{xxviii}, see graph below. This demonstrates the attractiveness of these areas to overseas and internal migrants.

GloMo Scores, LGAs across the Sydney region, 2011



Source: *Globalization and Cities Research Program, University of Canberra*

The Independent Local Government Review Panel's Global City

The Independent Local Government Review Panel chairman Professor Graham Sansom made recommendations for local government reform in NSW, including the creation of a 'global city' that would see the City of Sydney merge with Woollahra, Waverley, Randwick and Botany Bay councils to create a 'global Sydney' council.

As this chapter has demonstrated, the concept of a global city is tied more closely to a city's function and influence rather than size. A global city refers to a metropolitan area rather than a central city in isolation. The central city and its surrounding region (being the greater Sydney metropolitan area) need each other to function as a whole. Local government boundary changes would not make any difference to Sydney's ability to compete as a global city^{xxix}.

2. STRATEGIC PLANNING AND CAPACITY - SECTION 2 – PLANNING POLICY FRAMEWORK

2.2 Strategic planning context

This section presents a review of the existing relevant state and local policy framework likely to impact on the strategic land use planning for the group of councils; and includes an analysis of the implications of the planning policy framework on the group of councils.

‘A Plan for Growing Sydney’ (2014)

The Government has released a new metropolitan strategy for Sydney ‘A Plan for Growing Sydney’, a strategy for accommodating Sydney’s future population and economic growth. By 2031, Sydney’s economic output will almost double to \$565 billion a year and there will be 689,000 new jobs. In the next 20 years, Sydney’s population will grow by 1.6 million people^{xxx}.

The Plan provides the strategic planning framework for the Sydney metropolitan area (see figure 2.1) and addresses how the land use planning system can support and enhance Sydney’s global status by creating sufficient housing supply and jobs growth, well integrated with transport and infrastructure. The strategy is integrated with the Long Term Transport Masterplan and the 20 year State Infrastructure Strategy, connecting land use, transport and infrastructure.

The Government’s vision for Sydney, as outlined in the Plan, is ‘a strong global city, a great place to live’. To achieve this vision, the Government has set down goals that Sydney will be:

- A competitive **economy** with world-class services and transport;
- A city of **housing choice** with homes that meet our needs and lifestyles;
- A **great place to live** with communities that are strong, healthy and well connected; and
- A sustainable and resilient city that protects the **natural environment** and has a balanced approach to the use of land and resources^{xxxi}.

The Plan provides the foundation for land use planning decisions for the next 20 years and is based on three key planning principles: Principle 1: increasing housing choice around all centres through urban renewal in established areas; Principle 2: stronger economic development in strategic centres and transport gateways; and Principle 3: connecting centres with a networked transport system.

Transport Gateways – Sydney Airport and Port Botany Precincts

The plan identifies Sydney Airport and the Port Botany precinct as Sydney’s transport gateways. Both gateways support large employment and combined, they generate \$10.5 billion of economic activity and handle close to \$100 billion of freight^{xxxii}, with Port Botany moving over 6,000 containers on average every day^{xxxiii}. The Port Botany Precinct is situated across Randwick and Botany Bay Councils (see figure 3.2 in chapter 4.3). The Sydney Airport precinct is situated across the Botany Bay, Rockdale and Marrickville LGAs (see figure 3.3 in chapter 4.3) and is located within a kilometre of the Ports Precinct. Both precincts are close to areas undergoing significant urban renewal, including and between Green Square and Mascot station^{xxxiv}. The Ports and Airport precincts are tightly constrained and have limited space to expand^{xxxv}.

The plan identifies measures to boost capacity of Sydney's global gateways and include the need to maximise the productivity of the freight network, minimise congestion on road and rail access to the port and airport, preserve strategic freight sites, and separate heavy passenger and freight demands on the network^{xxxvi}.

The following table outlines the priorities for the transport gateways.

Sydney Airport Precinct
<ul style="list-style-type: none"> • Identify and protect strategically important industrial-zoned land in and near Sydney Airport Precinct. • Protect 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. • Facilitate road planning to connect Sydney Airport to WestConnex.
Port Botany Precinct
<ul style="list-style-type: none"> • Identify and protect strategically important industrial zoned land in and near Port Botany Precinct. • Protect Port Botany's function as an international gateway for freight and support port-related land uses and infrastructure in the area around the port. • Support the land use needs of freight movement to increase the proportion of container freight transported by rail. • Investigate a corridor for an enhanced road link from Port Botany to WestConnex.

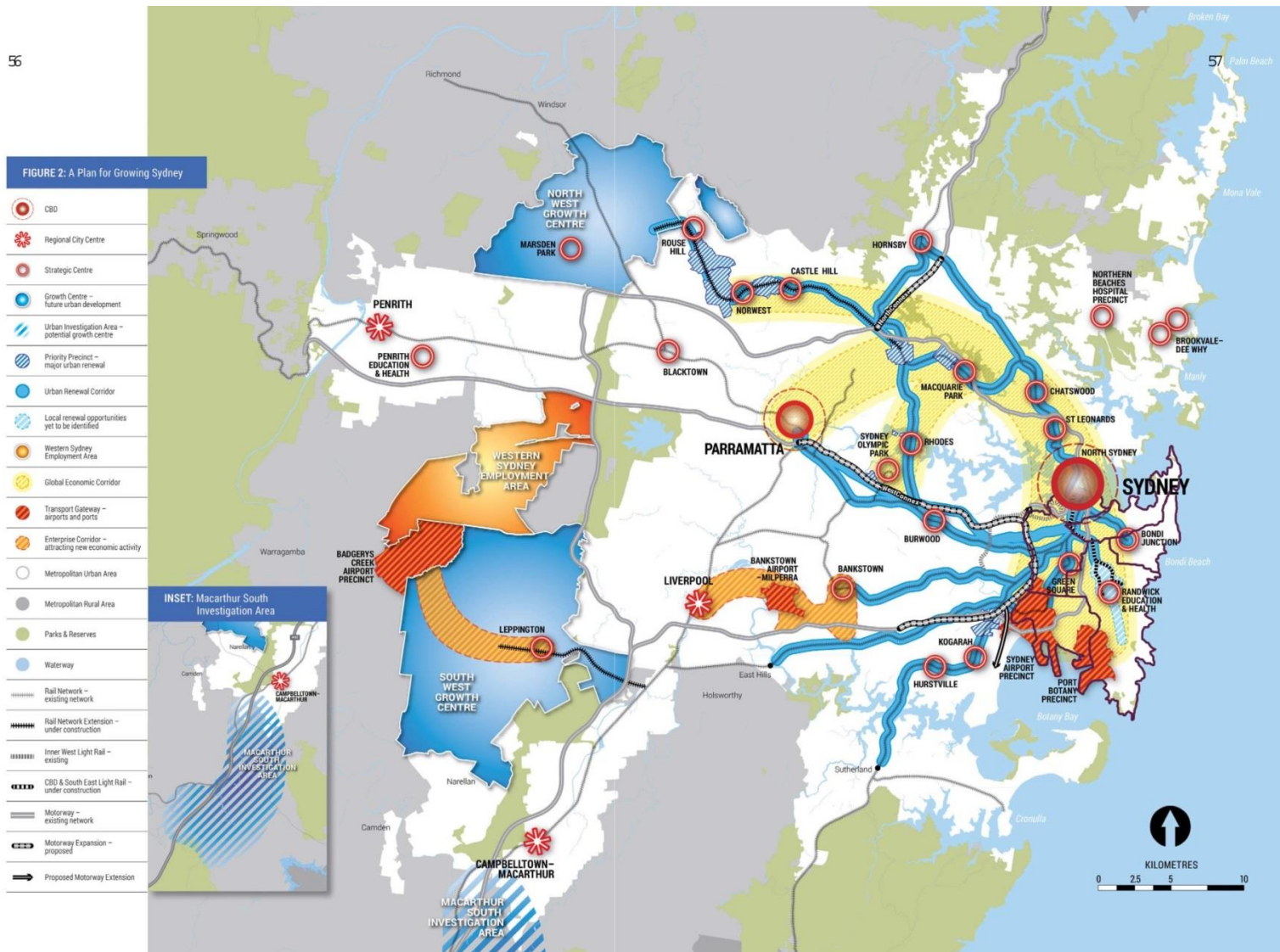


Figure 2.1 'A Plan for Growing Sydney' Source: A Plan for Growing Sydney

Strategic Centres

Sydney's largest and most important hubs for business and employment are referred to as strategic centres and transport gateways. Together, they account for 43 per cent of all jobs across Sydney^{xxxvii}.

Strategic centres are identified (in the Plan) as priority locations for employment, retail, housing, services and mixed-uses that are built around the transport network and feature major public investment in services such as hospitals and education and sports facilities^{xxxviii}. These locations (as outlined in figure 2.2 below) currently or are planned to have at least 10,000 jobs^{xxxix}. Key strategic centres in the study area include Sydney CBD, Green Square, Bondi Junction and Randwick Education and Health Strategic Centre. The plan focuses growth (jobs and housing) supported by investment in these centres to provide jobs closer to homes and reduce traffic congestion. It has been estimated that congestion costs Sydney \$5.4 billion a year, which is forecast to rise to \$8 billion by 2020^{xl}.

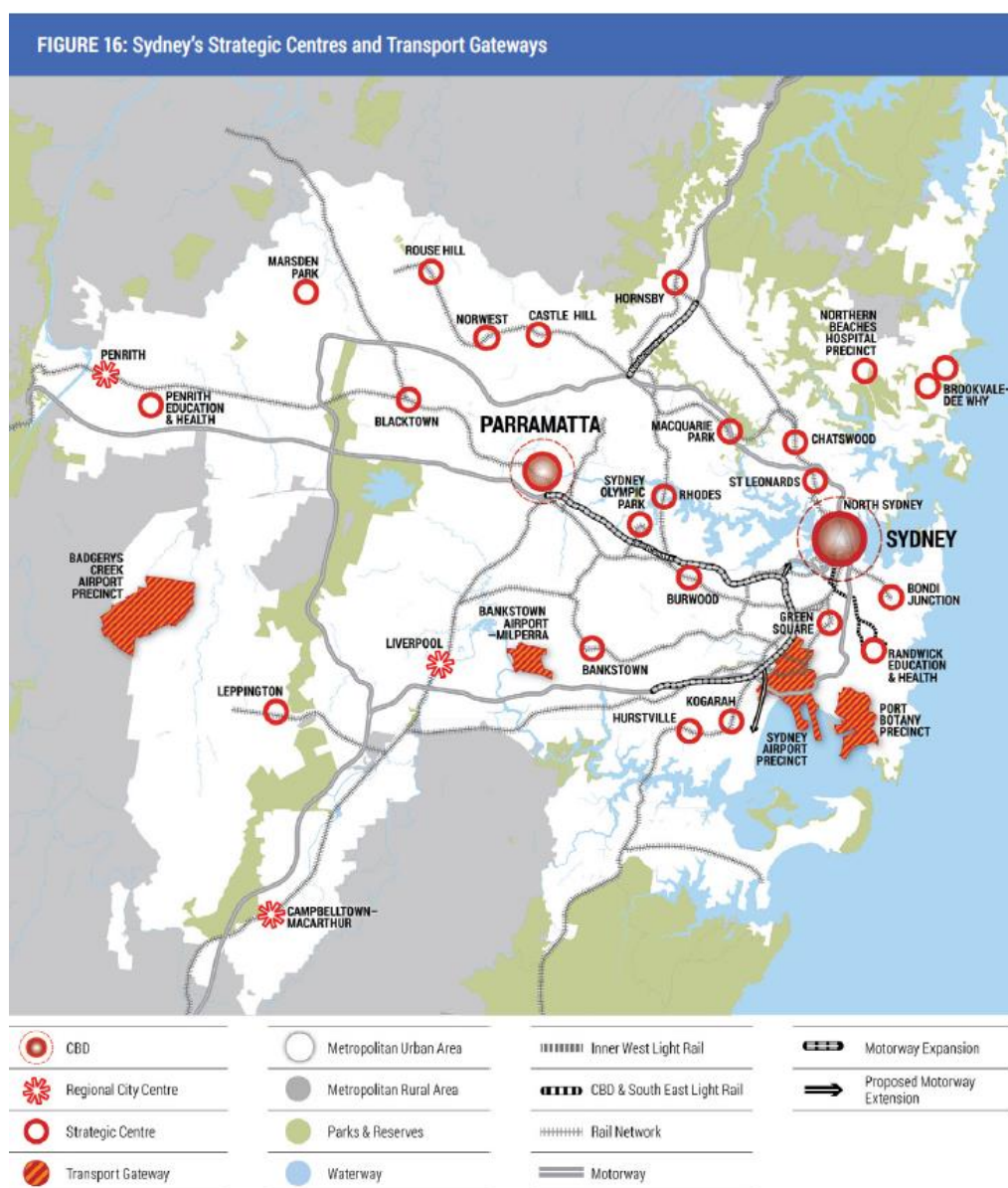


Figure 2.2: Sydney's Strategic Centres and Transport Gateways Source: A Plan for Growing Sydney

The following table outlines the overarching priorities for strategic centres in the region.

Global Sydney¹⁰
<p>Work with the City of Sydney and North Sydney Council to:</p> <ul style="list-style-type: none"> • Recognise and plan Global Sydney as a transformational place; • Plan Sydney CBD as Australia's premier location for employment, supported by a vibrant mixture of land uses and cultural activity, and iconic places and buildings including Sydney Harbour, the Opera House and the Sydney Harbour Bridge; • Provide capacity for long-term office growth in Sydney CBD; • Provide capacity for additional mixed use development in the precincts that make up Global Sydney for offices, retail, tourism, arts, culture, services and housing; • Improve access to the CBD including through Sydney Rapid Transit and the CBD and South East Light Rail; • Investigate a potential light rail corridor from Parramatta to Sydney CBD via Parramatta Road; and • Improve walking and cycling connections between Global Sydney precincts and to the surrounding area.
Bondi Junction
<ul style="list-style-type: none"> • Work with Waverley council to retain a commercial core in Bondi Junction, as required, for long-term employment growth. • Work with council to provide capacity for additional mixed-use development in Bondi Junction including offices, retail, services and housing.
Green Square
<ul style="list-style-type: none"> • Facilitate delivery of the UrbanGrowth NSW project for Green Square Town Centre comprising around 4,000 dwellings and 90,000m² of commercial and retail area^{xli}. • Work with the City of Sydney to provide capacity for additional mixed-use development in Green Square including offices, retail, services and housing.
Randwick Education and Health
<ul style="list-style-type: none"> • Support health-related land uses and infrastructure around Prince of Wales Hospital and Sydney Children's Hospital. • Support education-related land uses and infrastructure around the University of New South Wales. • Work with council to identify if opportunities exist for urban renewal around Randwick's education and health facilities, including offices, retail, services, housing and local community improvements.

Housing

The focus of housing supply, to accommodate the additional 1.6 million people forecasted by 2031, is to be around strategic centres, priority precincts, transport corridors and areas undergoing urban renewal. The setting of housing targets is to be delivered by subregional plans and is yet to be finalised.

Key areas in the study area likely to be the focus of housing investigations include the strategic centres of Bondi Junction, Green Square, and the Randwick Education and Health centre; and the

¹⁰ Global Sydney is defined in the plan as including the Sydney CBD, North Sydney CBD, Barangaroo, Darling Harbour, The Bays Precinct, Pyrmont-Ultimo, Broadway and Camperdown Education and Health Precinct, Central to Eveleigh, Surry Hills and City East. A map of Global Sydney (as defined in the plan) can be found in subsection 1 under 'Sydney as a Global Sydney'.

transport corridors of the rail line from Kings Cross to Bondi Junction and the CBD and South East Light Rail.

Note the priority precincts program identifies areas that the Minister for Planning considers have redevelopment potential on a scale that is important in implementing the State's planning objectives. There are currently 10 Priority Precincts identified none of which are located in the study area.

Urban renewal

Direction 2.2 of the plan *'Accelerate urban renewal across Sydney – providing homes closer to jobs'* identifies corridors for housing providing: *the opportunity to connect new homes to job-rich locations via good public transport, within an approximate 30 minute rail or light rail journey'* (Action 2.2.2). Of relevance to the group of councils subject to this report, the Plan identifies the Parramatta Road corridor as a key urban renewal area and the Anzac Parade corridor as 'local renewal opportunities yet to be identified', see figure 2.3 Central Subregion.

The Plan identifies the Anzac Parade corridor as 'a 10km long corridor extending the length of Anzac Parade, from Moore Park to La Perouse, and includes the centres and communities within walking distance of Anzac Parade'; and notes that the Government will continue to focus urban renewal activities to provide additional housing in this corridor. The corridor is identified in the plan as 'local renewal opportunities yet to be identified' (see figure 2.3 Central Subregion).

The Parramatta Road Corridor has been identified as a key corridor for urban renewal. Urban Growth NSW is the lead agency responsible for its renewal, a draft Parramatta Road Urban Renewal Strategy was released for public comment in November 2014. Parramatta Road is a 20km long corridor strategically connecting the two largest concentrations of jobs in Sydney – Sydney CBD and Greater Parramatta. It crosses 10 council areas including the City of Sydney to Parramatta Council. The corridor has good access to employment, the rail network, a range of social infrastructure, and the southern foreshores of Sydney Harbour and Parramatta River. The corridor is to be a focus for increased housing, economic activity and social infrastructure, especially around centres with good public transport access and amenity.

Subregional planning – Central subregion

Subregional planning is to guide the delivery of 'A Plan for Growing Sydney' across the city's (new) six subregions (Central, North, West Central, West, South, South West). The subregional boundaries were designed to 'reflect the economic and community relationships between Local Government Areas'^{xlii}. Previously the eastern suburbs councils of Botany Bay, Randwick, Waverley and Woollahra were its own subregion 'Eastern Sydney Subregion' and the City of Sydney LGA was also, its own subregion. However, in the new Plan the group of Randwick, Waverley, Woollahra, Botany Bay and City of Sydney councils are all located within the Central subregion along with Ashfield, Burwood, Canada Bay, Leichhardt, Marrickville and Strathfield councils. This is one of the largest subregions in the plan.

The Plan identifies priorities for the central subregion under each of the four goals of the plan. Relevant priorities as they apply to the group of councils are as follows:

G1 A competitive economy
<ul style="list-style-type: none"> • Preserve a corridor for Sydney Rapid Transit. • Enable delivery of key transport projects to facilitate better connections to Global Sydney, including Sydney Rapid Transit, CBD and South East Light Rail, and WestConnex • Prepare and deliver a Structure Plan for the Sydney Airport and Port Botany Precincts to support their growth
G2 Accelerate housing supply, choice and affordability
<ul style="list-style-type: none"> • Work with councils to identify suitable locations for housing intensification and urban renewal, including employment agglomerations, particularly around Priority Precincts, established and new centres, and along key public transport corridors, including metro rail lines; the CBD and South East Light Rail; and Sydney Rapid Transit.
G3 Build great places to live
<ul style="list-style-type: none"> • Improve the accessibility of cultural and recreational facilities outside the Sydney CBD, such as the Moore Park sporting and entertainment precinct.
G4 Protect the natural environment and promote its sustainability and resilience
<ul style="list-style-type: none"> • work with councils to protect the natural attributes and visual amenity of the coastline and enhance opportunities for public access.

Subregional delivery plans for each subregion are to include (amongst other things) jobs and housing targets at the local government level. These plans are yet to be prepared but are expected to be finalised in the next 12 months.

FIGURE 27: Central Subregion

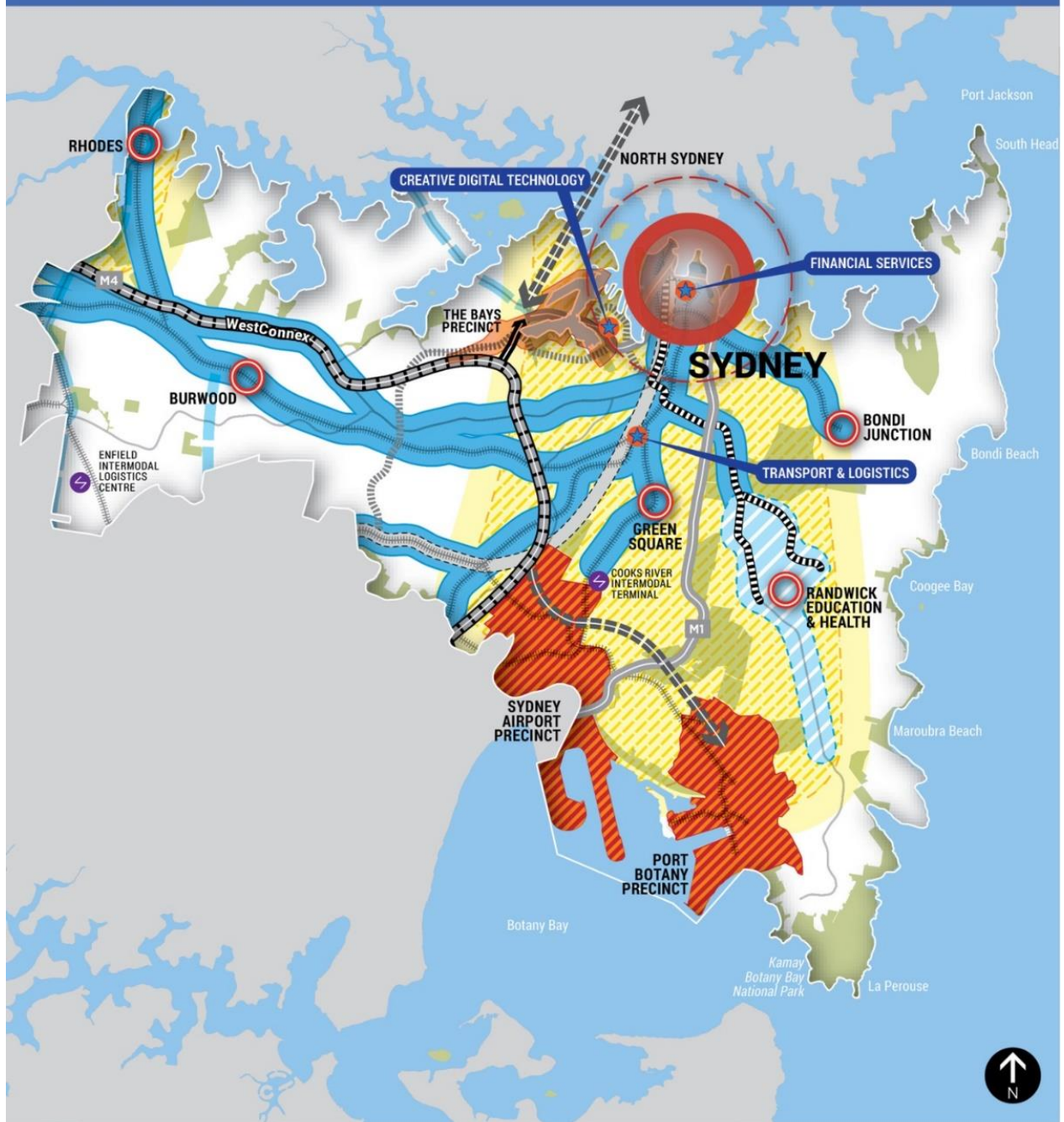


Figure 2.3 Central Subregion Source: A Plan for Growing Sydney

NSW 2021 State Plan – 10 year plan

NSW 2021 was released in September 2011 and replaces the State Plan as the NSW Government's strategic business plan, setting priorities for action and guiding resource allocation. NSW 2021 is a ten year plan with five strategies and 32 goals to rebuild the economy, provide quality services, renovate infrastructure, restore government accountability, and strengthen local environment and communities.

The five strategies of the NSW 2021 Plan include:

1. Rebuild the economy —restore economic growth and establish NSW as the 'first place in Australia to do business'
2. Return quality services —provide the best transport, health, education, policing, justice and family services, with a focus on the customer
3. Renovate infrastructure —build the infrastructure that makes a difference to both our economy and people's lives
4. Strengthen our local environment and communities —improve people's lives by protecting natural environments and building a strong sense of community, and
5. Restore accountability to government —talk honestly with the community, return planning powers to the community and give people a say on decisions that affect them.

Relevant goals and targets in the State Plan that may influence strategic planning across the group of councils include:

Goal 5: Place downward pressure on the cost of living	Target 5.1: Improve housing affordability and availability
Goal 7: Reduce travel times	Target 7.1: Improve the efficiency of the road network during peak times on Sydney's road corridors
Goal 19: Invest in critical infrastructure	Target 19.1: Increase expenditure on critical NSW infrastructure
Goal 20: Build liveable centres	Target 20.1: Planning policy to encourage job growth in centres close to where people live and provide access to public transport
Goal 22: Protect our natural environment	Target 22.1: Protect and restore priority land, vegetation and water habitats
Goal 29: Restore confidence and integrity in planning system	Target 29.1: Implement a new planning system

The plan draws on the State Infrastructure Strategy and the NSW Long Term Transport Master Plan and includes the 'Eastern Sydney and Inner West – Regional Action Plan', which is a key delivery mechanism to deliver the strategies and goals of the state plan.

Eastern Sydney & Inner West Regional Action Plan

The Action Plan was released in December 2012 and includes Ashfield, City of Botany Bay, Burwood, Canada Bay, Canterbury, City of Sydney, Leichhardt, Marrickville, Strathfield, as well as Randwick, Waverley and Woollahra local government areas.

The Regional Action Plan aligns with the NSW 2021 Plan and identifies five priorities for the NSW Government for the Eastern Sydney and Inner West region, including:

1. More efficient and reliable transport
2. Grow the economy of the region
3. Provide more affordable housing options
4. Build liveable and sustainable cities
5. Provide more support for vulnerable members of the community and reduce the high concentration of homelessness

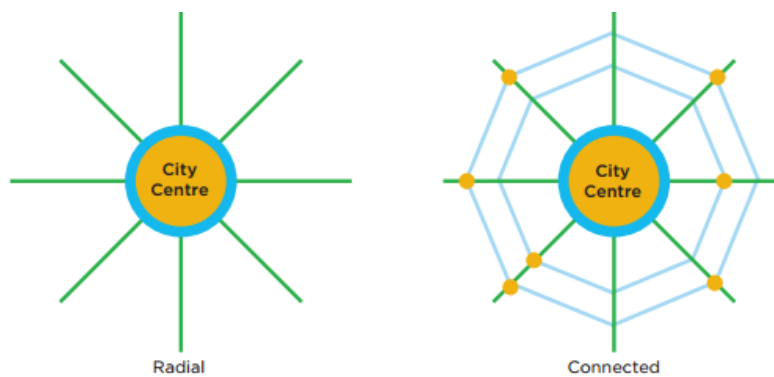
Relevant priorities and actions that may influence strategic planning for the region include:

More efficient and reliable transport
<ul style="list-style-type: none"> - Implement the NSW Long Term Transport Master Plan to provide a clear direction for transport over the next 20 years - Extend light rail in Sydney - Develop a Precinct action plan for Port Botany and Sydney Airport - Continue to maintain and upgrade the existing cycling network
Grow the economy of the region
<ul style="list-style-type: none"> - Plans to support key industry sectors within the region (Key sectors in the region to benefit from the Plans include: creative industries, the digital economy, international education and research, manufacturing, professional services and tourism) - Improve urban planning to increase access to employment lands - Promote Sydney and the region as a tourism and events destination
Provide more affordable housing options
<ul style="list-style-type: none"> - Improve housing supply by working with Local Government to develop local housing strategies to provide additional housing opportunities close to established centres to take benefit of local services and infrastructure - Deliver affordable housing and seniors housing, which meets community needs and respects local character.
Build liveable and sustainable cities
<ul style="list-style-type: none"> - Deliver enhanced local infrastructure (eg. Replacement of the Tamarama Beach kiosk and construction of an amenities building at Waverley Park for Waverley Council) - Improve access to recreational opportunities
Provide more support for vulnerable members of the community and reduce the high concentration of homelessness
<ul style="list-style-type: none"> - Integrate and improve services for La Perouse and South Maroubra - Deliver initiatives to address homelessness in Eastern Sydney and Inner West
Improve community safety and reduce alcohol related violence and antisocial behaviour
<ul style="list-style-type: none"> - Review clustering of licensed premises within a geographical area - Crime prevention and graffiti reduction
Improve access to healthcare for vulnerable populations and improve support for an ageing population
<ul style="list-style-type: none"> - Support the Central Sydney, Darlinghurst and Randwick Health and Medical Research Hubs - Deliver more support for an ageing population

NSW Long Term Transport Master Plan (2012)

The Master Plan is a 20 year plan for the future planning of NSW transport system. Its vision is that in the next 20 years Sydney will become a more compact, multi-centred, connected city, with a

transport network that provides quick and convenient public transport connections across the city and frequent links to other cities.



Source: Long Term Transport Master Plan (LTTM)

Transport has an important role in supporting Sydney as a global city. Strong connectivity across the (metropolitan area of the) city, quality public transport networks and opportunities for walking and cycling can all contribute to maintaining Sydney's role as a centre of economic and social activity.^{xliii}



Figure 2.4: Key demand corridors Source: LTTMP

A focus of the Master Plan is to support connections to and between the Global City (comprising Sydney CBD/North Sydney), the regional cities of Parramatta, Liverpool and Penrith, strategic centres, gateways and the Global Economic Corridor to support productivity and economic growth, and to link people to jobs. Key transport demand corridors are identified which facilitate these connections.

The map below indicates constrained strategic transport corridors in 2031. It shows stronger constraints on the demand corridors to Global Sydney (CBD and North Sydney), with a secondary focus on constrained corridors to regional cities/strategic centres of Liverpool, Parramatta, Penrith and Macquarie Park.

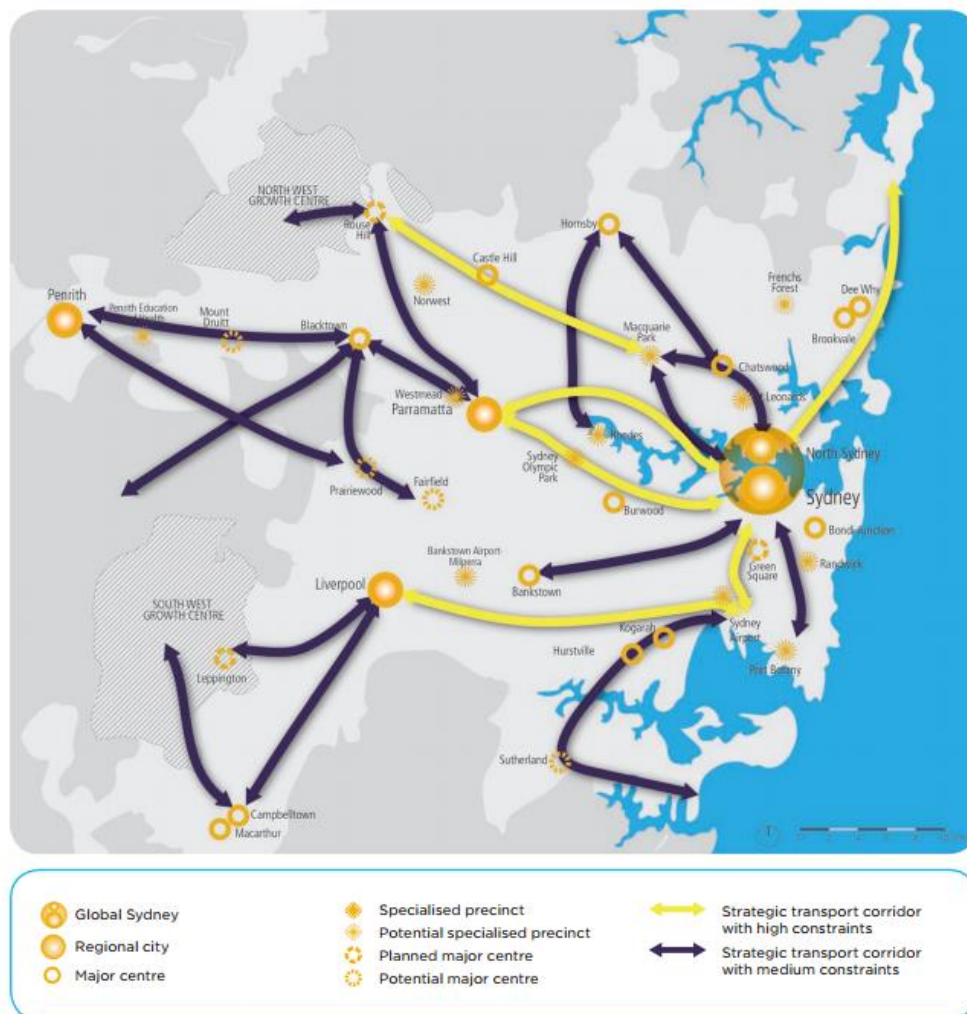


Figure 2.5: Sydney's constrained strategic corridors in 2031 Source: LTTMP

The distribution of urban centres and predominant land uses indicates compact communities radiating from the Global City of Sydney CBD/North Sydney, with smaller clusters of compact communities around the regional cities of Parramatta, Liverpool and Penrith.

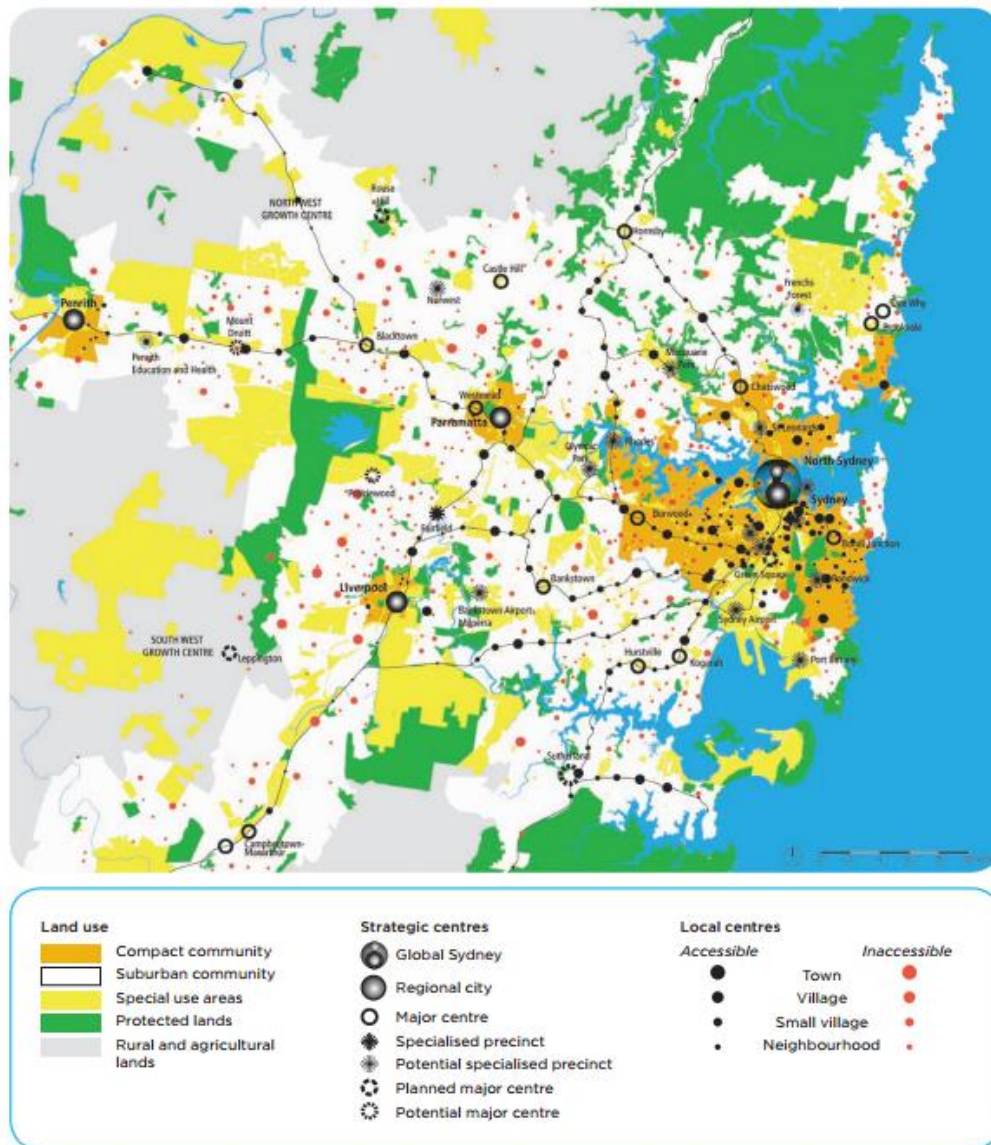


Figure 2.6: Sydney's urban centres and key land use profile Source: LTTMP

Future employment and residential growth precincts within the inner Sydney area indicate a spread of growth from Glebe and the Bays Precinct in the inner west, Mascot to the south, and Bondi Junction and Randwick in the east.

In the eastern subregion Randwick Education and Health Strategic Centre and Port Botany are identified as activity nodes, with significant forecast employment growth and strategic importance for Sydney's future.



Figure 2.7: Precincts with forecast significant population and employment growth in inner Sydney between 2011 and 2031 Source: LTTMP

Key actions/strategies in the Master Plan with spatial and strategic land use/transport planning implications are:

Road	Complete critical links in the motorway network (citywide)
	Plan and implement Westconnex
	Expand capacity on congested corridors (metropolitan area wide and CBD)
Rail	Complete the north west and south west rail links
	Build light rail in the CBD and south east
CBD	Support the city centre as a focal point of demand
Port/Airport	Development of a Port Botany and Sydney Airport Improvement Plan
Corridors	Plan for and preserve future transport corridors
	Investigate medium/long term corridor from Malabar to Sydney CBD
	Investigate medium/long term corridor from Sydney Airport to Sydney CBD

Priority actions and future transport corridors are indicated in the maps below.

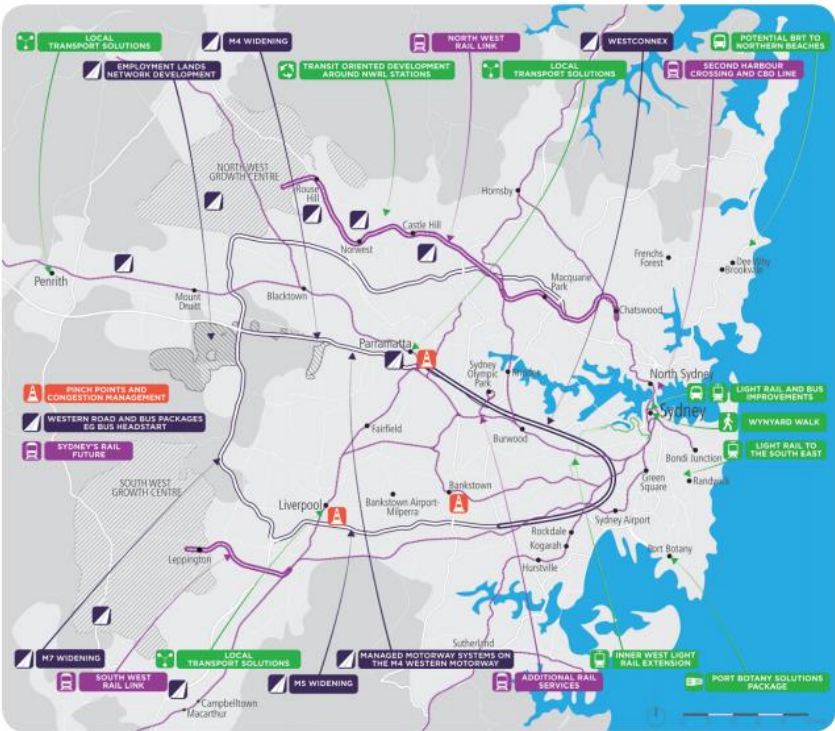


Figure 2.8: Priority Actions for Sydney Source: LTTMP



Figure 2.9: Medium and Long term transport corridors for investigation to support urban renewal in Sydney Source: LTTMP

Detailed plans

Detailed plans link to the Master Plan, including integrated modal delivery plans for bus, light rail, ferry, road, rail, cycling and walking. Additional detailed plans include a corridor strategy and city access plan, and a NSW freight and ports strategy.

Key actions in addition to network-wide strategies are outlined below:

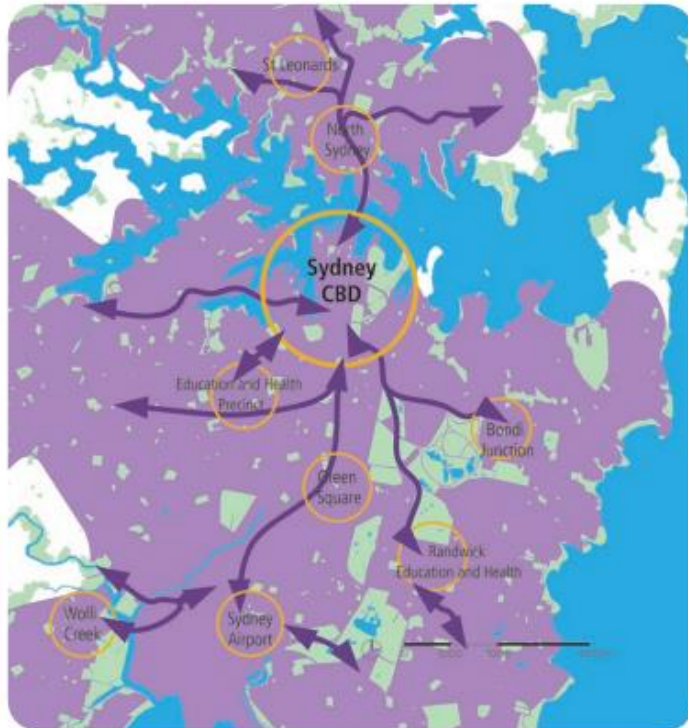
Detailed Plan	Key actions
Sydney's Rail Future	Complete southwest rail link
	Second harbour crossing and CBD rail line and stations
	Complete north west rail link
Sydney's Bus Future	Bus head start program in growth centres
	Enhance bus priority on strategic bus corridors
	Re-design city bus network to complement rail and light rail
	Bus rapid transit for northern beaches
	New CBD bus interchange investigations
	Investigate BRT or light rail on high demand corridors
Sydney's Light Rail Future	Complete inner west light rail
	Complete CBD and south east light rail
	Investigate potential extensions eg: to Malabar and Walsh Bay
	Investigate BRT or light rail on high demand corridors eg: Parramatta Road, Victoria Road
Sydney's Cycling Future	Connected cycling network within 5km of local centres
	Priority cycleways in the CBD and eastern subregion include Eastern suburbs link (Bondi Junction to CBD), South East Light Rail Links and Sydney Airport links
Sydney's Ferry Future	Build new ferry hub at Barangaroo & upgrade Circular Quay ferry terminal
Sydney's Walking future	Plan and deliver for walking in conjunction with key transport projects including CBD and South East light rail
	Bondi Junction to CBD connection
	Moore Park pedestrian bridge
Central Sydney Access Strategy	Reduce congestion and service future growth in the city centre
	Increase capacity, reliability and quality of public transport
	Pedestrianisation of George Street
	Improve pedestrian priority and upgrade amenity in CBD

Connecting Inner Sydney

Inner Sydney has the highest number of people who commute to work by bicycle in NSW. As detailed in the Sydney City Centre Access Strategy we are working with the City of Sydney to confirm the Sydney CBD strategic cycleway network. We are concentrating on the provision of continuous links, separated from other road users where possible, that connect cycle entry points to the CBD and provide safe passage through the city.

- 5km catchment to major centre
- Major centres + neighbourhood destinations
- Strategic bicycle corridor

NOTE: corridors are subject to detailed route selection with local councils and the community.

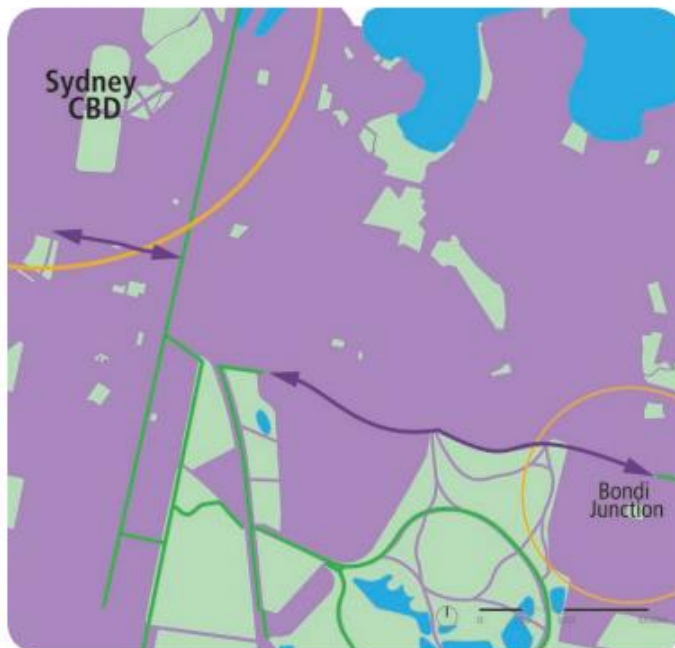


Eastern Suburbs link

We will make improvements to the bicycle route between Bondi Junction and the Sydney CBD, including a proposed separated cycleway along the northern side of Centennial Park from York Road, Bondi Junction to Lang Road, Centennial Park. This investment will improve longer-distance connections that link to facilities in Sydney's CBD.

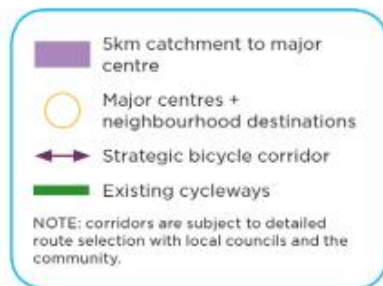
- 5km catchment to major centre
- Major centres + neighbourhood destinations
- Strategic bicycle corridor
- Existing cycleways

NOTE: corridors are subject to detailed route selection with local councils and the community.



South East Light Rail links

We will increase bike riding in South East Sydney by improving connections to the Randwick Racecourse, hospital and university precinct. This will improve access to stations on the future CBD and South East Light Rail. We will make transferring from one mode to another easier by providing secure bicycle parking at major interchanges.



Sydney Airport links

Around half of the 12,000 people that travel to work at Sydney Airport everyday live within cycling distance of the airport. We will complete missing links in bike routes from surrounding areas in St George, the Eastern Suburbs, Inner Sydney and the Inner West. This will also improve connections with residential growth areas at Wolli Creek, Mascot and Green Square.

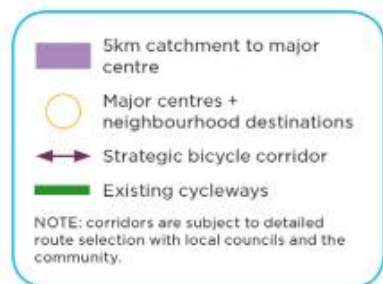


Figure 2.10 Connected cycling network within 5km of local centres Source: Sydney's Cycling Future pg.16 and 17

Origin of weekday (all day) trips to the city centre – 2011 to 2031

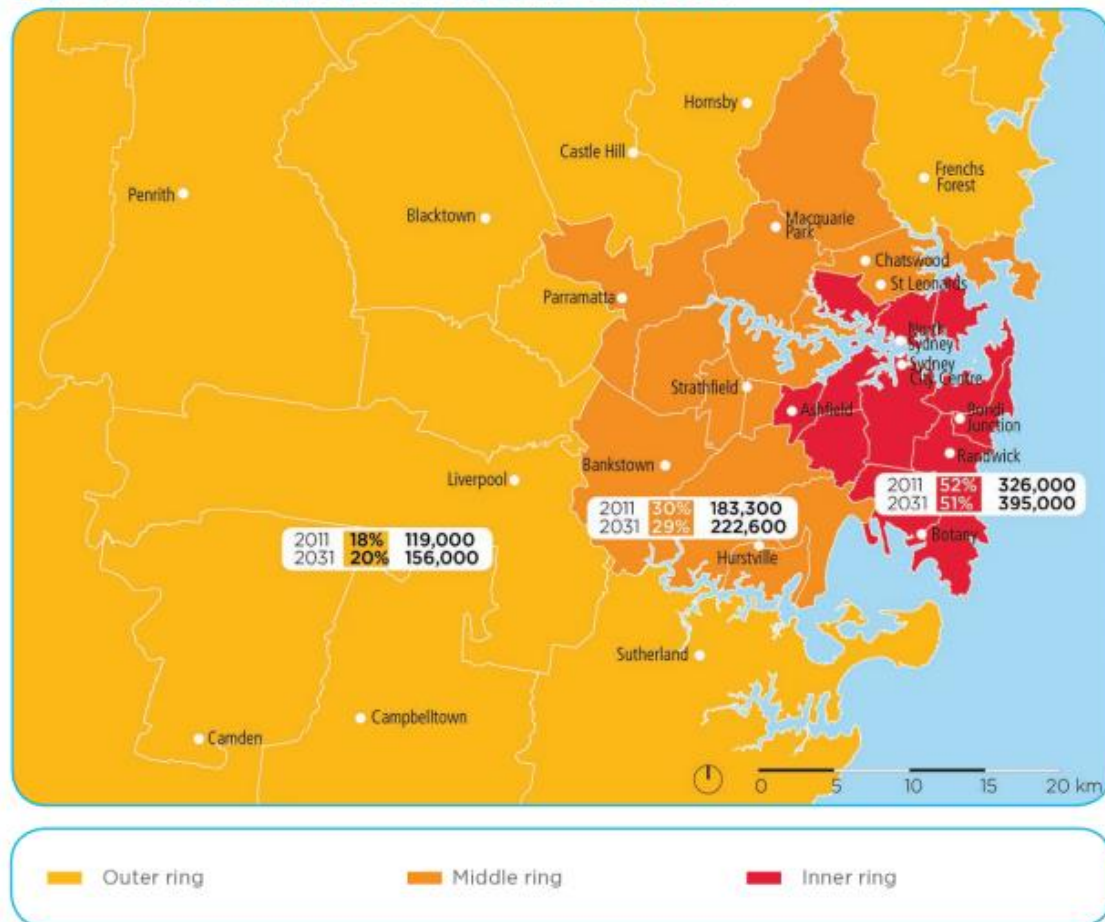


Figure 2.11 Origin of weekday trips to the city centre Source: City Centre Access Strategy 2012)

NSW Infrastructure Strategy - 2014 update

The updated Infrastructure Strategy sets priorities and recommended initiatives for infrastructure investment and delivery over a 20 year period. Three critical priorities are:

1. A competitive global Sydney
2. Supporting population and economic growth in greater Sydney
3. A competitive and connected regional economy

Key strategies for metropolitan Sydney are:

- a) Improve public transport connectivity to employment centres
- b) Reduce congestion across the transport network
- c) Support transit-oriented urban renewal in inner city areas
- d) Improve connections to Parramatta as 2nd CBD
- e) Support Parramatta's economic potential

Key projects/investments recommended in the Strategy impacting central Sydney, CBD, North Sydney and/or the eastern subregion are:

- Sydney Rapid Transit: extension of northwest rail link under Sydney harbour via CBD to Bankstown including a 2nd harbour rail crossing
- Implement Sydney's Rail Future Stage 2
- Expedited motorway projects including Westconnex extensions, and plan for a Sydney Gateway linking Westconnex link to Port Botany/Sydney Airport
- West harbour tunnel (3rd crossing of Sydney harbour) congestion management/mitigation across key corridors
- Assess extension of Sydney light rail and opportunities to support urban renewal and densification (CBD & South East Light Rail and Inner West Light Rail)
- Improve connectivity to Parramatta and western Sydney, including improved connections between Parramatta and Sydney CBD
- Ensure landside infrastructure supports rapid growth in freight & air travel at Port Botany and Sydney Airport
- Port Botany to Moorebank intermodal connection, including investigating potential for road to rail shift for Port Botany freight
- Develop Sydney CBD and Parramatta cultural precincts
- Upgrades to Moore Park precinct, focusing on SFS/SCG



Figure 2.12: Potential Anzac Parade Light Rail Extensions Source: NSW Infrastructure Strategy

NSW Freight and Ports Strategy (2013)

The Strategy provides a 20 year framework for integrated planning, coordination and investment in freight movement to deliver a freight network that efficiently supports economic growth, while balancing freight needs with those of the broader community and environment. It responds to the National Port and Land Freight Strategies, and is consistent with the objectives of the Long Term Transport Master Plan.^{xliv}

Freight volume is expected to almost double from 409 million tonnes in 2011 to 794 million tonnes in 2031, with container freight expected to triple. In order to deliver capacity and performance improvements ahead of demand, the Strategy outlines three Strategic Action Programs of network efficiency, capacity and sustainability. Key actions in these programs relevant to the study area are to:

- Identify and protect strategic freight corridors
- Establish corridors to meet long term freight needs
- Develop and maintain freight capacity on road networks
- Complete Westconnex and Port Botany link
- Develop and maintain freight capacity on rail networks

- Separate passenger and freight movements by rail
- Enhance rail networks, reduce bottlenecks
- Complete Western Sydney freight line and intermodal terminal
- Complete the Northern Sydney rail freight corridor
- Develop a Port Botany Growth Plan to meet freight volume growth
- Foster intermodal terminal network development in metropolitan areas
- Manage congestion, noise and emission impacts of freight transport
- Shift more freight movements to off-peak periods
- Understand and plan for strategic landside needs to support growth in air cargo
- Incorporate the value of air cargo in planned infrastructure upgrades to Port Botany/Sydney Airport

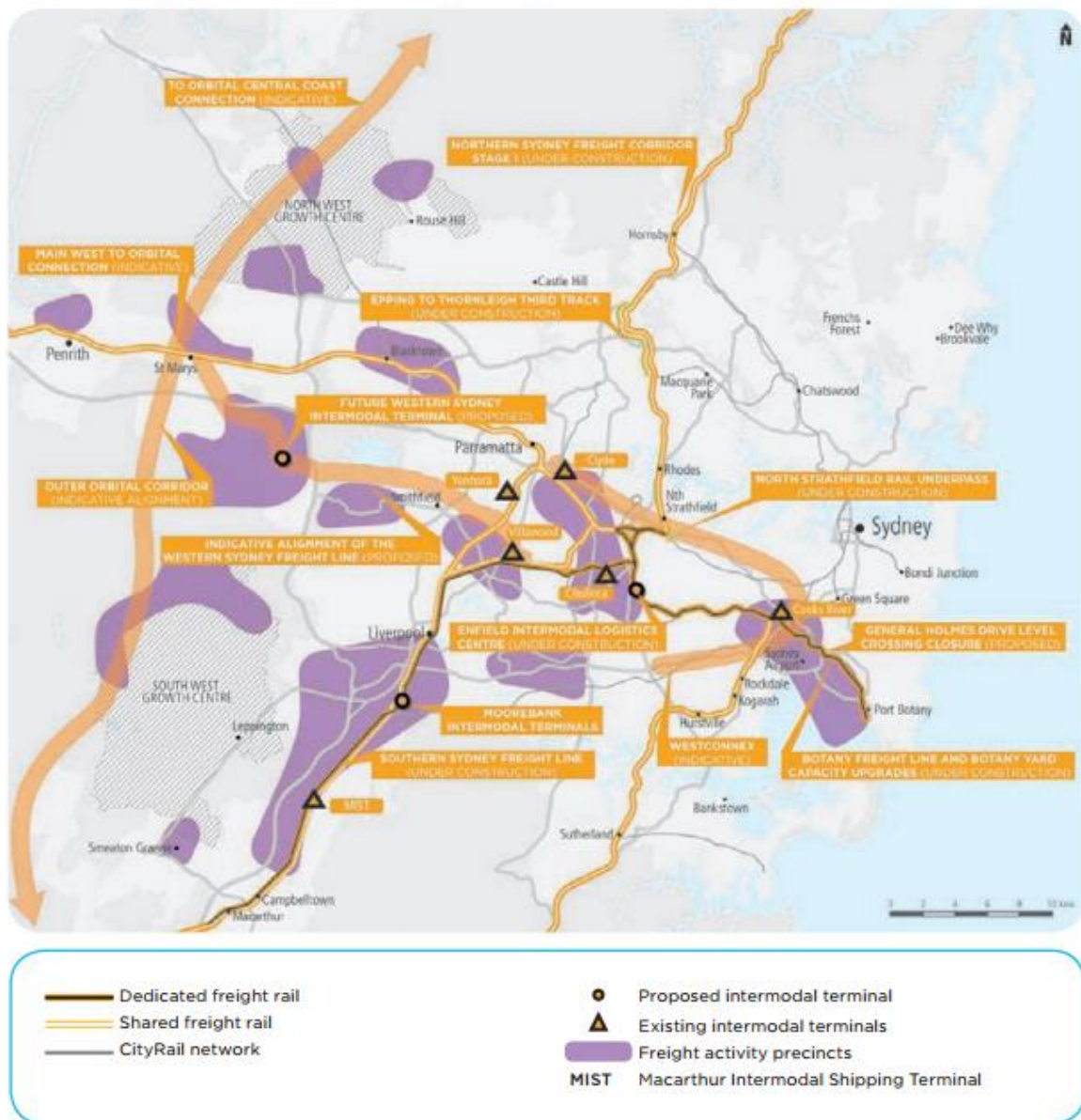
Port Botany

Port Botany is the primary NSW container port, with growth estimated at 7% per annum, and expected to reach natural capacity by 2030-2040. It is a critical issue for delivery and clearance transport by road and rail to at least maintain efficiency, in order to accommodate forecast growth.

85% of import and export containers originate from or are destined for locations within a 40km radius of Port Botany. Intermodal terminals serve to distribute freight from containers to destinations, acting as inland satellite ports. They are essential enablers to increase the potential capacity of freight that can be moved by rail, which can effectively reduce congestion from Port Botany and Sydney Airport.^{xlv}

Across NSW 33% of freight was carried by rail in 2011. However, rail mode share of containers from Port Botany has declined from 25% in 2001 to 14% in 2012. The target in the State Plan 2021 to double the mode share of container movements by rail places further pressure on improving the efficiency of freight rail movements at Port Botany.

Figure 28 Freight activity precincts and key infrastructure projects



Source: NSW Freight and Ports Strategy (2013)

Sydney Airport and Port Botany precinct

The NSW Freight and Ports Strategy identifies Sydney Airport and Port Botany as a freight activity precinct. Each year it generates \$10.5 billion of economic activity and handles \$100 billion in freight.^{xlvi} Governance in the precinct covers all levels of government as well as the private sector, with the federal government responsible for airports, customs and defence, NSW government responsible for strategic land use planning and major transport networks, and local councils responsible for local roads and supporting community amenity.^{xlvii}

A scoping study prepared for the Port and Airport precinct for Infrastructure NSW notes the importance of alignment of governance structures, and planning and infrastructure objectives to manage competing land use and transport demands over time. For example, competing interests across the State Government, local councils, Sydney Ports, SACL, and the RMS has hindered effective

congestion management in the precinct. In particular, efforts to secure cooperation over land use around the airport for road works have been slow and will require effective coordination and governance to balance the interests of all parties.^{xlviii}

Implications of the second Sydney Airport on freight

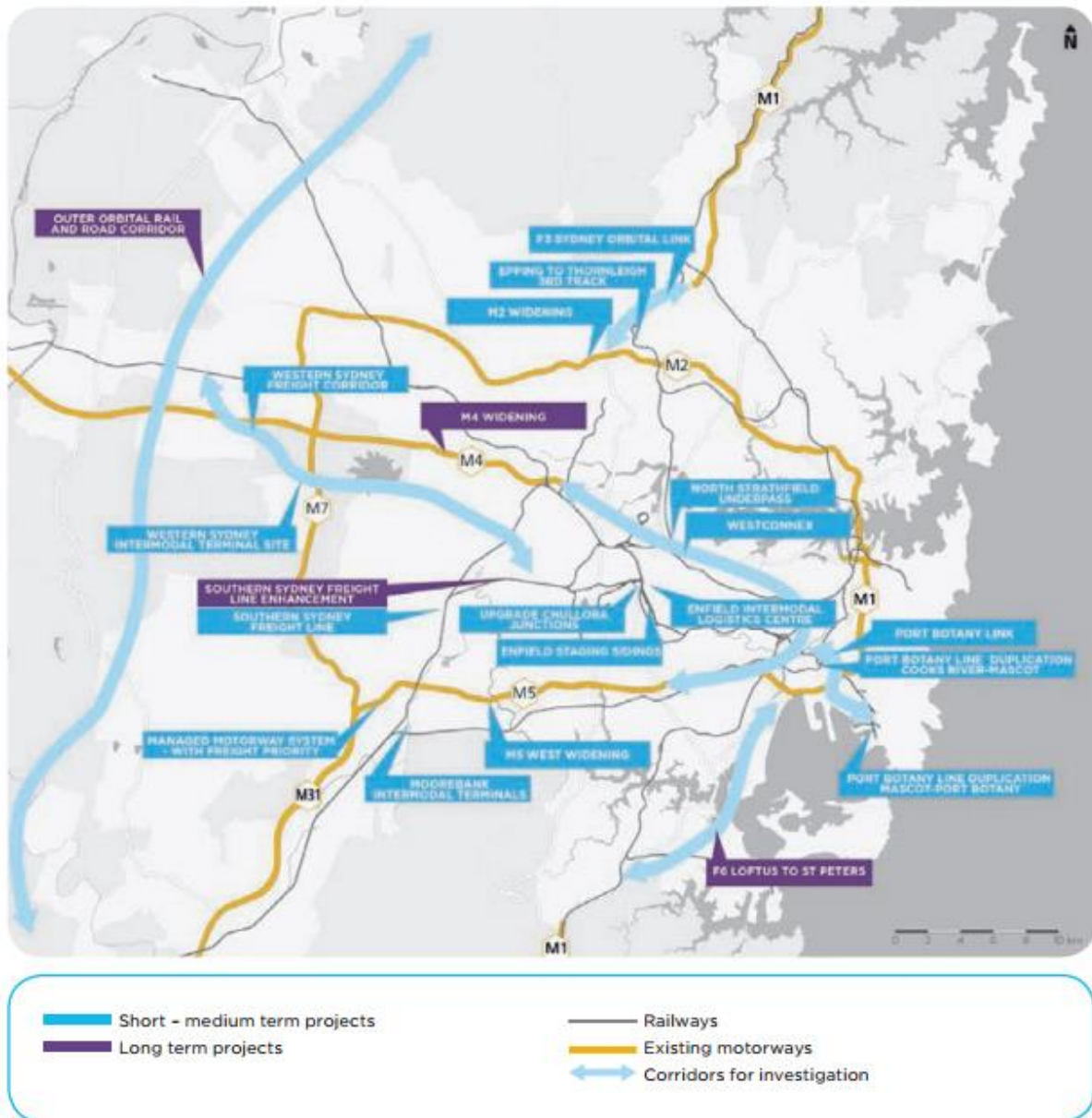
The NSW Freight and Ports Strategy was prepared prior to the announcement of a second Sydney airport at Badgerys Creek, but it does contain an action to work closely with the federal government on future airport planning to ensure alignment with landside infrastructure planning and development.

The federal government confirmed the site for an airport in western Sydney at Badgerys Creek in April 2014. An EIS is expected to be exhibited during 2015, with the airport potentially operational in the early 2020s.^{xlix}

Recent studies have highlighted significant growth in air freight demand that will place Sydney Kingsford Smith Airport under pressure, with expectations that additional capacity may be required as early as the mid 2020s.ⁱ

There are potential benefits of a second Sydney airport in reducing congestion in the Port Botany/Sydney Airport precinct, and providing air freight capacity near a growing number of major freight logistics establishments and manufacturing in western Sydney.ⁱⁱ This could shift a significant percentage of freight handling from the Port Botany/Sydney Airport precinct. However this is contingent on the strategy of a future airport operator, and provision of suitable road and rail infrastructure (eg: freight rail line and Westconnex and port links). In the long term this could then have a flow on effect to surrounding land uses, with potentially less pressure on land availability for port-related uses in the study area.

Figure 31 Forecast freight infrastructure projects in the Sydney metropolitan area



Source: NSW Freight and Ports Strategy (2013)

2013 – 2016 Regional Development Australia (RDA) Sydney Regional Plan

RDA Sydney is one of 55 Regional Development Australia (RDA) nationally, and is a partnership formed out of a Council of Australian Government (COAG) agreement between the Australian, State and Local Governments.

The Sydney Regional Plan is a three year plan that identifies the challenges for an economically, environmentally and socially sustainable Sydney, and provides priority solutions to address them, including key place-based solutions^{lii}.

The following is a summary of some of the key priorities for the Sydney Metropolitan Region as it applies to the proposed subregion identified in the plan:

- Jobs closer to home
- Creating a 40 year long-term vision for Sydney
- Adopting whole of government planning which encompasses utilities, roads, transport, health, employment and education
- Expanding and developing Sydney's capacity as a global city attracting investment and sustainable development
- Minimising congestion by creating new ways of working and living that can reduce our dependence on the motor vehicle

Local Government Plans

The Randwick City Plan (2013)

The Randwick City Plan is a long-term strategic plan that aims to manage environmental, social and economic change across the City over the next 20 year. First developed in 2006, this Plan is kept up-to-date by ongoing and close consultation with the community. The Plan reflects the community's aspirations and needs, and outlines the clear directions Randwick City Council will take to shape Randwick's future. The guiding principles in developing the Plan were the 'Principles for Sustainable Cities' and 'Principles of Social Justice'.

The Plan comprises six broad interrelated themes:

1. Responsible management
2. A sense of community
3. Places for people
4. A prospering city
5. Moving around, and
6. Looking after our environment.

Under each of the themes above, the Plan sets out specific outcomes, future directions as well as actions to achieve these outcomes.

Waverley Together 3 (2013)

Waverley's 12-year community strategic plan, Waverley Together 3, is the Council's third strategic plan since 2006 and reflects the Waverley community's long-term priorities and aspirations for the future, and forms the foundation for all Council operations and subsequent plans.

The strategic plan sets out the specific directions, strategies, targets and indicators necessary for achieving the following:

- Sustainable community
- Sustainable living
- Sustainable environment, and
- Sustainable governance.

Woollahra 2025 (2010)

Woollahra 2025 was adopted by Council in April 2010. The Strategic Plan was developed in consultation with the Woollahra community and presents a 15 year vision structured around five (5) broad interrelated themes, each of which is supported by a range of Goals and Strategies. The themes are:

- Community well being
- Quality places and spaces
- A healthy environment
- Local Prosperity
- Quality leadership and participation

Sustainable Sydney 2030 (2008)

Sustainable Sydney 2030 is the vision and strategic plan for the City of Sydney over the next 20 years. It was adopted by Council in June 2008.

The Strategic Vision highlights five big moves to transform the City:

1. A revitalised City Centre at the heart of Global Sydney - Lively, people-friendly centre for premium business, reconnected to the Harbour.
2. An integrated Inner Sydney transport network - New sustainable transport connecting Inner Sydney, the City Centre and the City's Villages, with congestion removed from the City Centre and Villages.
3. A liveable green network - Continuous green corridors integrated with liveable streets, providing dedicated pedestrian and cycle ways, and new ways to explore the City and its Villages.
4. Activity Hubs as a focus for the City's villages and transport - Sustainable places for communities in the City's distinctive villages to meet, catch transport, create, learn, work and shop.
5. Sustainable development renewal - Initiatives to re-make the City, including energy and water efficient infrastructure, affordable housing, high quality public space, design and access to essential transport choices.

The Sustainable Sydney 2030 City Strategy includes 10 strategic directions, objectives, actions and project ideas which aim to translate the Five Big Moves of the vision into reality.

Botany 'Vision 2040 – The City We Want' (yet to be finalised)

Botany Vision 2040 'The City We Want' is a 25 year plan in development that will shape the future of the City of Botany Bay. The Council undertook community workshops in November to December 2014 to help formulate the plan.

The Botany Bay Planning Strategy provides a framework for growth and development to 2031. It was developed to guide the preparation of Botany Bay Local Environmental Plan (LEP) 2013 which commenced on 21 June 2013.

Local Government Reform

Revitalising Local Government – Final report of the NSW Independent Local Government Review Panel – October 2013

In March 2012 the Minister for Local Government, the Hon Don Page MP, appointed the Independent Local Government Review Panel following a request from the then Local Government and Shires Association (now Local Government NSW). The panel, led by Professor Graham Samson, looked at options for local government structures, governance models and boundary changes.

The Panel completed its work in October 2013 and its final report and recommendations were exhibited for public comment in early 2014.

The final report notes *‘the importance of maintaining Sydney as Australasia’s premier ‘global city’ and makes the observation that ‘Australia’s global city is still divided amongst forty-one councils, many of which lack the scale and resources to play an important role in metropolitan affairs. There is also a deepening divide between a privileged east and a struggling west. Gaps in coordination amongst State agencies have made matters worse.’*

The Panel concluded that the number of local councils in the Sydney basin should be significantly reduced, specifically the inner and eastern suburbs, the lower North Shore and around Parramatta and Liverpool. The Panel’s objectives in relation to options for mergers in relation to strategic planning are to:

- Underpin Sydney’s status as a global city; and
- Support implementation of the Metropolitan Strategy, especially the planning and development of major centres and the preparation and implementation of sub-regional Delivery Plans.

In relation to Metropolitan Sydney ‘Reshaping metropolitan governance’, the report notes that there needs to be much stronger coordination focused on metropolitan planning and major projects, with a clear locus of responsibility; full alignment of the State Plan and Metropolitan Strategy (including through sub-regional plans); and robust arrangements for a much closer working relationship with councils.

In relation to the City of Sydney, the Panel has recommended two options to be considered:

1. Relatively minor adjustments to the city’s current boundaries to enhance the potential for improved urban management (eg at Newtown, Paddington and south into Botany) and to include regional facilities such as Centennial Park.
2. A greatly enlarged city that takes in the whole of the Eastern Suburbs and stretches south to the airport and Port Botany, thus incorporating nearly all the iconic locations and features that contribute to Sydney’s global identity, as well as much of the supporting infrastructure.

The preferred option (in bold) presented in the report as it applies to the eastern suburbs councils, Botany Bay and the City of Sydney is as follows:

Table 8: Merger and Boundary Change Options for Sydney Metropolitan Councils

Council/s	Options (preferred option in bold)	Rationale
Botany Bay, Randwick, Sydney, Waverley, Woollahra	<ul style="list-style-type: none"> • Amalgamate or • Combine as strong Joint Organisation 	<ul style="list-style-type: none"> • Projected 2031 population 669,400 • Close functional interaction and economic/social links between these councils • Need for high-level strategic capacity to promote and support Sydney's ongoing development as Australia's premier global city • Scope to bring together Sydney's international icons and key infrastructure under a single council, and to make better use of the strong rating base of these councils

Implications of the policy framework

- Economic growth to be concentrated in the economic nodes of global Sydney, the global economic corridor, southern Sydney employment lands, strategic centres, and transport gateways of Port Botany and Sydney Airport.
- Future housing growth to be focused in strategic centres, government (surplus) land, transport corridors and areas identified for urban renewal.
- Increase housing choice around centres through urban renewal in established areas
- Increase the percentage of the population living within 30 minutes by public transport of a city or major centre
- Connecting centres with a networked transport system
- Improve access to recreational opportunities and linkages between regional open spaces to form a green space network
- Focus to strengthen western Sydney and make Parramatta, Sydney's second CBD
- Recommendation for local government reform to amalgamate Botany Bay, Randwick, Sydney, Waverley and Woollahra councils to form a single council area

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Strategic planning in the study area

The following provides a discussion on strategic planning across the study area against key planning themes such as housing, transport, employment, and parks and recreation as they apply for each council area. It attempts to identify key commonalities and/or linkages amongst the group of councils subject to this report. A matrix has been developed (in the Appendix) which illustrates key aspects under each planning theme to help identify commonalities and linkages between each council area. The matrix is not intended to be a comprehensive audit of the attributes of each local government area; rather it aims to highlight key items/aspects under each planning theme. The outcomes of this review is to assist in identifying costs and benefits in relation to metropolitan planning associated with the seven merger options.

The following discussion draws on an independent report by SGS economics and planning (2013) commissioned by Randwick City Council titled *Eastern Sydney Local Government Review*. The review looked at potential options for structural change to local government including amalgamation options against a set of criteria, one of them being metropolitan planning. Another key study is on an economic profile of Randwick, Waverley and Woollahra local government areas (LGAs), conducted by SGS economics and planning in 2013.

The study area

The study area covers five local government areas (LGAs) including the City of Sydney, Botany Bay, Randwick City, Waverley and Woollahra. It is noted that Eastern Sydney is often identified as a sub-region for planning of the Sydney metropolitan area, by the NSW Department of Planning and Environment, and includes Botany Bay, Randwick, Waverley and Woollahra LGAs^{liii}.

The following provides a snapshot of each local government area in the study area.

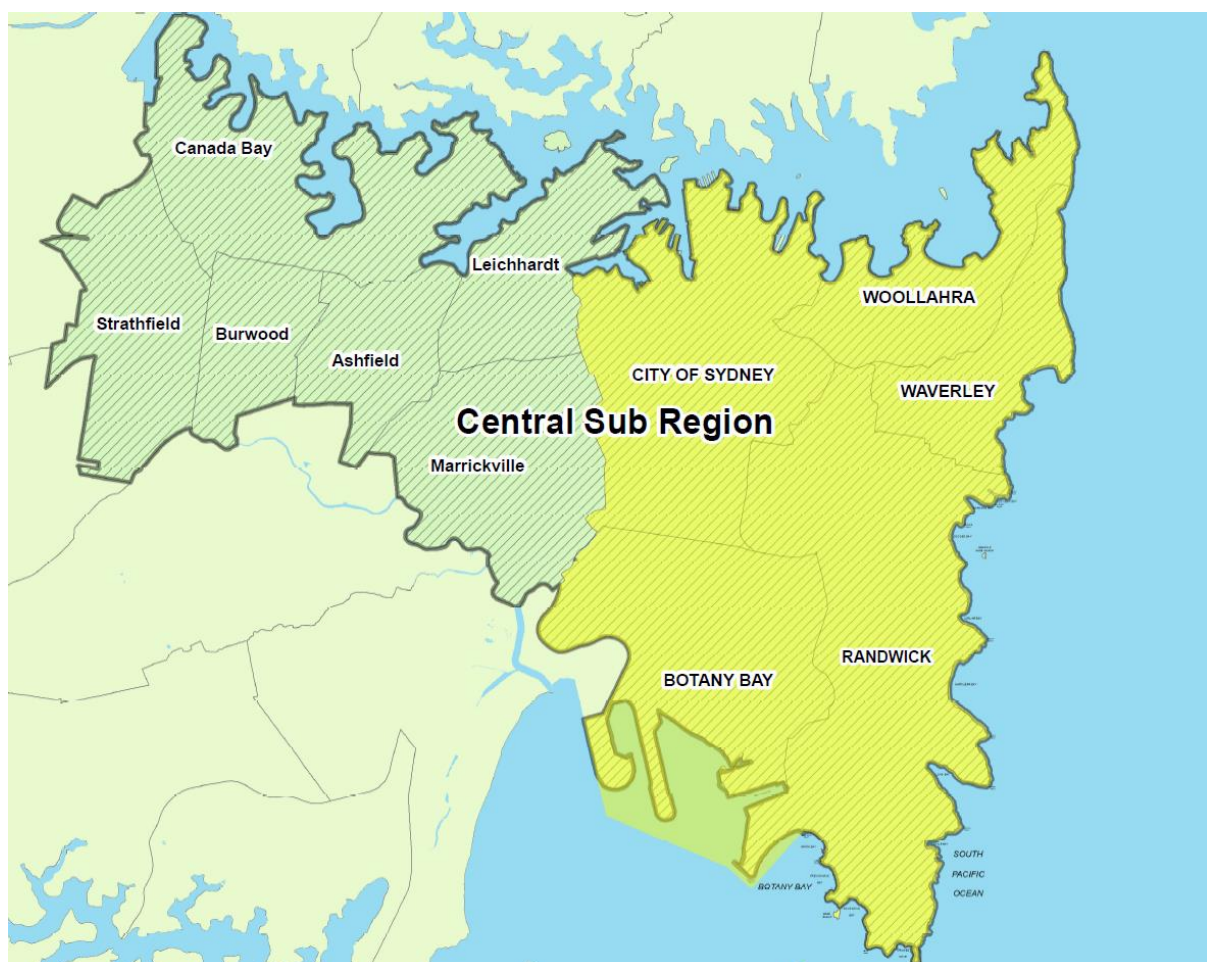
The City of Sydney covers an area of approximately 26.15 km². It is home to 182,500 residents and provides 390,000 jobs, and on an average day, including visitors and students, it is estimated that there are more than one million people in the City. The City of Sydney is a focal point for activities and services at the local, national and global level^{liv}. Sydney's density is the highest of the group of councils with around 7,182 persons per km². In the City of Sydney, 94.7% of dwellings types were medium or high density^{lv}. The City is experiencing significant growth with Green Square Urban Renewal and Barangaroo urban development on the CBD's western fringe.

Randwick is located in the south-east of the Eastern Sydney sub-region, covering over 37 km². Randwick City has extensive parklands, which includes Centennial Park, Heffron Park and the coastal environments of Botany Bay National Park, coastal parklands including nine coastal beaches and the Royal Randwick Racecourse. Randwick City's housing stock is diverse with higher density housing forms to the north, and low density housing forms to the south. Also to the south are the industrial lands and Port Botany. In addition to industrial land in the south, Randwick City has employment based institutions such as the University of New South Wales, Randwick TAFE and Randwick Hospitals (including Prince of Wales Hospital)^{lvi}.

The Botany Bay LGA is approximately 21.67 km² and is bordered by the LGAs of City of Sydney to the north, Randwick to the east and Marrickville and Rockdale to the west. The LGA contains Sydney Airport and Port Botany. Key transport corridors including the freight line and Southern Cross Drive (part of the Western Sydney Orbital freeway system) divide the LGA. The Airport, Port, industrial areas and Botany Wetlands occupy over 50 per cent of the LGA^{lvii}.

Woollahra covers an area of 12.3 km² and is located on Sydney Harbour's southern shore. It has some of the highest real estate values in Australia. Woollahra has 16 km of Sydney Harbour foreshore providing attractions such as city views, beaches and bays; as well as 100 hectares of parkland and coastal headlands around South Head.

Waverley is the smallest of the group of councils with an area of approximately 9 km². Bondi Junction acts as the major commercial and retail centre, providing regional services, large numbers of employment opportunities and a transit interchange. Bondi Beach offers a tourist attraction all year round and in summer, overseas and local visitors flock to Bondi, Tamarama and Bronte. Most of the area is residential in character with a high diversity of housing types.



Subject local government areas in the subregional context

Economic activity and employment

Economic activity

The group of LGAs in the study area adjoins and forms part of the southern part of the Global Economic Corridor however each LGA has a unique economic specialisation. The City of Sydney Council is the clear leader in terms of gross regional product (GRP) output¹¹, producing an estimated \$101.87 billion, the largest industry (in terms of employment) being the financial and insurance services industry.

Following from the City of Sydney Council, Botany Bay Council generated \$9.5 billion GRP, the most productive (or value add¹²) industry being from the Transport, Postal and Warehousing industry generating \$3,714 million in 2013/14. The Transport, Postal and Warehousing industry is also the largest industry in terms of employment, which is reflective of the role of the Airport and Port precinct in the receiving and moving of goods in the LGA.

Randwick City Council's GRP was estimated at \$7.77 billion, the most productive industry was in education and training, generating an estimated \$1,123 million in 2013/14; followed closely by health care and social assistance, generating an estimated \$1,007 million in 2013/14. The health care and social assistance industry is also Randwick City's largest employer, generating 11,605 local jobs in 2013/14¹³ but only marginally. The education and training industry follows closely behind, generating 11,504 local jobs in 2013/14.¹³

Waverley's gross regional product was \$4.04 billion; the largest industry (in terms of employment) being from retail and trade, is reflective of the significant role Westfield Bondi Junction and associated retail has in the region and as a tourist destination. However, the most productive industry is from the construction industry generating \$344 million in 2013/14.

Woollahra Council's gross regional product was \$3.94 billion; the largest industry in terms of employment is the education and training industry. However, the most productive industry is in rental, hiring and real estate services, generating \$358 million in 2013/14.

In relation to Randwick City, the Long Term Transport Master Plan notes that Randwick is expected to experience 50 percent growth in industry output between 2011 and 2031, reflecting the substantial increase in jobs forecast for the area. The main driver for this growth is the Randwick Education and Health Strategic Centre, centred on the University of NSW and the Randwick Hospitals campus.

The research SGS (2013) undertook into the economic profile of the eastern suburbs councils of Randwick, Waverley and Woollahra found that the education and health care industries have high

¹¹ as of 30 June 2014. The Gross Regional Product of an area is the equivalent of Gross Domestic Product, but for a smaller area. It is the amount of the nation's wealth which is generated by businesses, organisations and individuals working in the area. Source: NEIR 2014 & <http://economy.id.com.au/>

¹² Value added by industry is an indicator of business productivity in a Council area. It shows how productive each industry sector is at increasing the value of its inputs. It is a more refined measure of the productivity of an industry sector than output (total gross revenue), as some industries have high levels of output but require large amounts of input expenditure to achieve that. Source: NEIR 2014 & <http://economy.id.com.au/>

¹³ Source: National Institute of Economic and Industry Research (NIEIR)

employment, high growth and high specialisation within the Eastern Suburbs. Health care and education are the two major industries of employment within the Eastern Suburbs, accounting for 34 percent of total jobs^{lix}.

Employment distribution

The following map illustrates the distribution of employment, key strategic centres and linkages within the region being the City of Sydney, Randwick, Woollahra, Waverley and Botany Councils.

The region's major strategic and economic assets and hence employment include the transport gateways of Sydney Airport and Port Botany, the Central Business District, the Randwick Hospitals Complex, the education facilities of the University of New South Wales and Randwick TAFE, and Bondi Junction. The Royal Randwick Racecourse and Moore Park Precinct are also located in the region.

The largest commercial and retail centres in the region include the Central Business District, Bondi Junction, Eastgardens and to a lesser extent Double Bay, Randwick Junction/The Spot and Maroubra Junction town centres. The Green Square town centre as part of the Green Square urban renewal area will be a key commercial and retail precinct for Green Square and surrounds.

These areas are key drivers of employment containment for regional, subregional and metropolitan services.

Key north-south linkages exist along the transport corridors of Anzac Parade, Bunnerong Road and the eastern distributor, linking the CBD to the transport gateways through the Southern Sydney employment lands. Avoca Street is a key north-south transport corridor linking Randwick and Waverley Councils. Important East – West linkages exist from Botany to Randwick including Fitzgerald Avenue and Gardeners Road; and Woollahra to the CBD from New South Head Road and Old South Head Road.

Key Employment Areas and Centres

Randwick Education and Health Strategic Centre

The Randwick Education and Health strategic centre is a major employment hub in the north of the Randwick LGA. The centre is identified as a strategic centre in the NSW Government's 'A Plan for Growing Sydney' and is characterised by a concentration of education and health-related institutions, businesses and research presence including the University of NSW and Prince of Wales Hospital, Royal Hospital for Women and the Children's Hospital, Neuroscience Research Australia and the Lowy Cancer Centre.

The centre is Randwick City's largest employment area and in 2011 accounted for around 35 percent of jobs within Randwick City^{lx}. Employment growth is expected to continue, especially in the health fields as demands rise with an ageing population and with advances in health research and treatment. Growth in the Centre is estimated at an additional 4,000 to 6,000 jobs by 2031^{lxi}.

The SGS (2013) report into the economic profile of the Eastern Suburbs noted that the Randwick Education and Health precinct is an example of a current cluster of health and education related

businesses and institutions within the Eastern Suburbs and this provides a platform for further growth of businesses and hence jobs within this industry sector^{lxii}. Advantages of clustering and colocation mean that Randwick continues to become more attractive as a location for health-related businesses^{lxiii}. Strategic planning is important for identifying the key elements needed to support an industry cluster. In recognition of the importance for future planning of the centre, Randwick City Council prepared (in 2011) a precinct plan with input and feedback from key stakeholders in the Centre, state government agencies, and the community. The precinct plan provides strategic directions and detailed actions for the future growth of the Centre.

Royal Randwick Racecourse

Royal Randwick Racecourse managed by the Australian Turf Club, is home to some of the state's most important horse racing events with over 400,000 race visitors per year. It increasingly hosts other feature events, as well as housing the country's largest training centre with 550 horses stabled on site. It directly employs over 2000 full-time and casual staff.

Royal Randwick has recently undergone a \$150 million redevelopment of a new six-level grandstand and associated spectator and event facilities^{lxiv}. In addition to the redevelopment, a 170 room 4 star apartment hotel has also been approved on site and is due for completion in 2019. The Racecourse also adjoins the Randwick Education and Health Strategic Centre and is part of the precinct plan for the area. Further discussion on the Racecourse's role as a major visitor attraction is discussed within the Parks and Recreation sections of this report further below.

Bondi Junction

Bondi Junction is the major retail and commercial centre in the Eastern Suburbs providing regional services, large numbers of employment opportunities and a transit interchange^{lxv}. It is identified as a strategic centre in the NSW Government's 'A Plan for Growing Sydney'. The centre has more than 90,000 square metres of office space^{lxvi}, a large range of retail and medical uses as well as medium to high density residential living^{lxvii}. Bondi Junction also capitalises on the high volume of visitors passing between CBD and Bondi Beach (over 2 million visitors per year)^{lxviii}.

Linkages and employment distribution

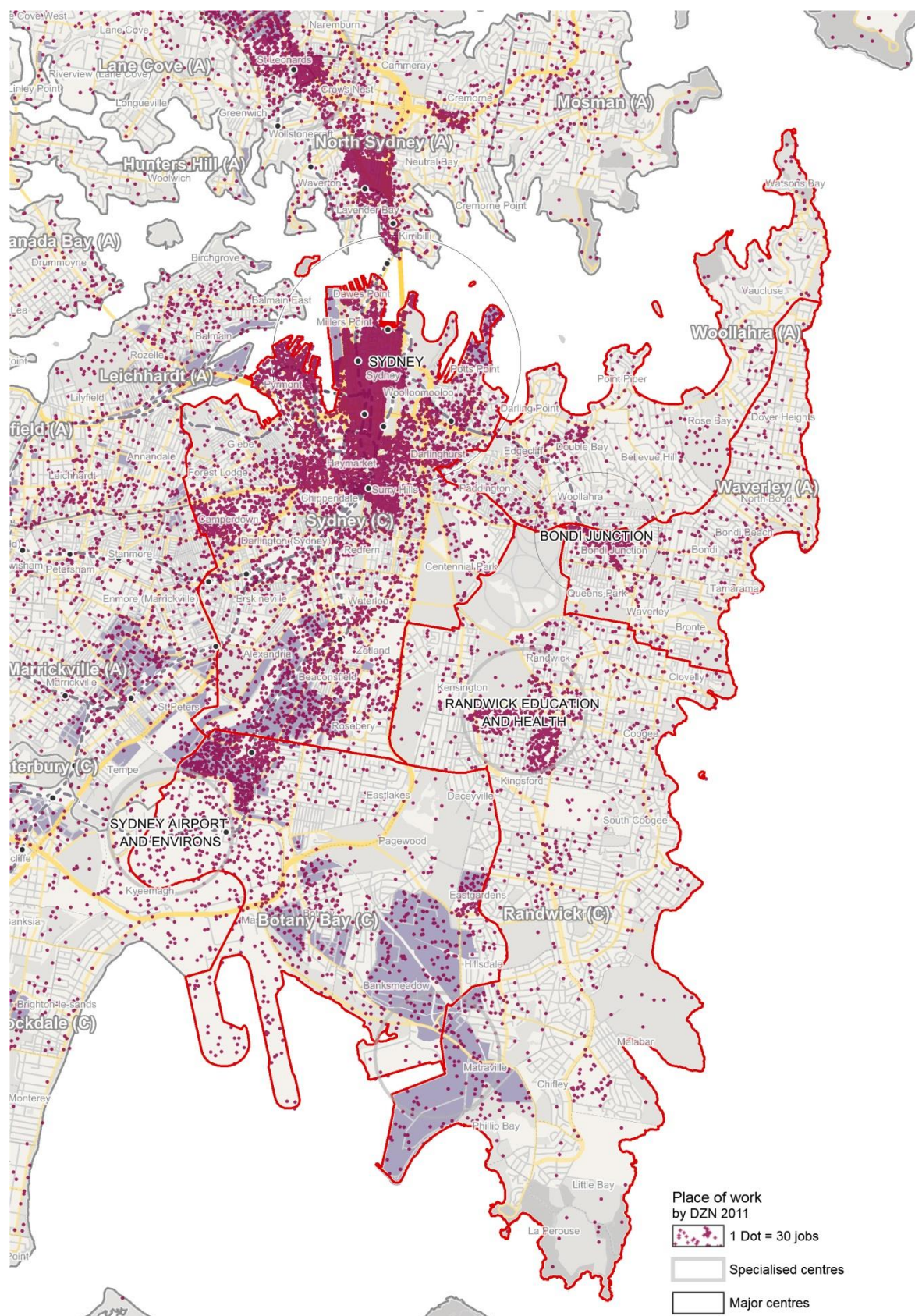


Figure 3.1 Employment distribution Source: SGS 2015 Place of Work

Port Botany Precinct

Port Botany and Environs comprises the Port facilities and the adjoining industrial lands in both Randwick and Botany LGA. Over half of the Botany Bay LGA land area is made up of industrial and commercial land uses, much of which plays an important role in supporting Port Botany and Sydney Airport and therefore the wider Sydney and NSW economy^{lxix}. The precinct is serviced by a network of State roads linking the industrial lands to other parts of Sydney (including the CBD), which facilitates the transport of goods to and from the Port. The adjoining industrial lands also provide a location for local light and freight and logistics industries^{lxx}.

The economic zone of the Port and the surrounding industrial activities to its north is split between the Councils of Randwick and Botany Bay (see figure 3.2). The SGS report (2013) on the Eastern Suburbs Local Government Review noted that this split between the two councils is hampering effective planning as an integrated area. The report goes on to say ‘the prospects for coordinating land and port side activities would be enhanced if the port and landside industrial activities were in a single council area.’^{lxxi} A previous NSW Government Commission of Inquiry into local government boundaries in 2001 noted a desire by the then Port operator to be situated within a single local government area, with a preference for Randwick City. A recommendation of the Inquiry was that “the boundaries between Randwick and Botany Bay councils should be adjusted such that all of Port Botany would be within Randwick City Council.”^{lxxii}

The SGS review recommended that ‘It makes strategic and administrative sense to enhance planning and coordination in this nationally significant economic zone to revise local government boundaries’^{lxxiii}.

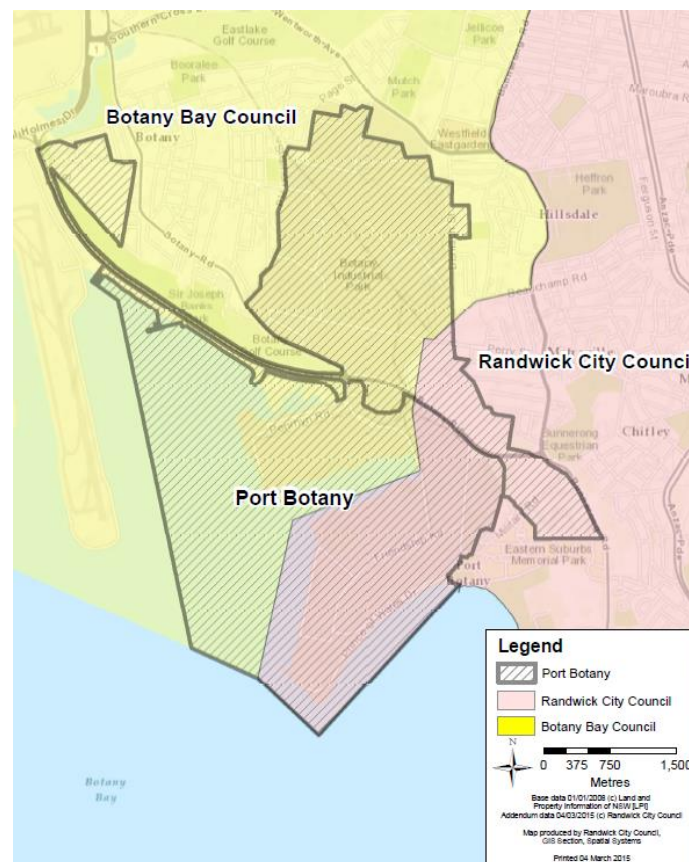


Figure 3.2: Port Botany Precinct Local Government Boundary Overlay

Sydney Airport Precinct

Sydney Airport is one of Australia's single most important pieces of infrastructure and is a major generator of jobs and economic growth. It is identified as a Transport Gateway in the NSW Government's 'A Plan for Growing Sydney' in recognition of the airport's significant concentrations of jobs and the role it plays as connecting Sydney with locations across Australia and the world^{lxxiv}. A recent study by Deloitte Access Economics found that the airport generates or facilitates direct and indirect employment of 283,700 jobs (equivalent to 8% of NSW employment), including 160,000 direct jobs (28,000 directly on airport land)^{lxxv}.

The airport has an approximate total site area of 907 hectares and similar to the Ports Precinct, the Sydney Airport Precinct is situated across three LGAs including Rockdale, Marrickville and Botany Bay (see figure below figure 3.3). The Sydney Airport Master Plan 2033 was approved in February 2014 and outlines the strategic direction for the airport's development over the next 20 years.

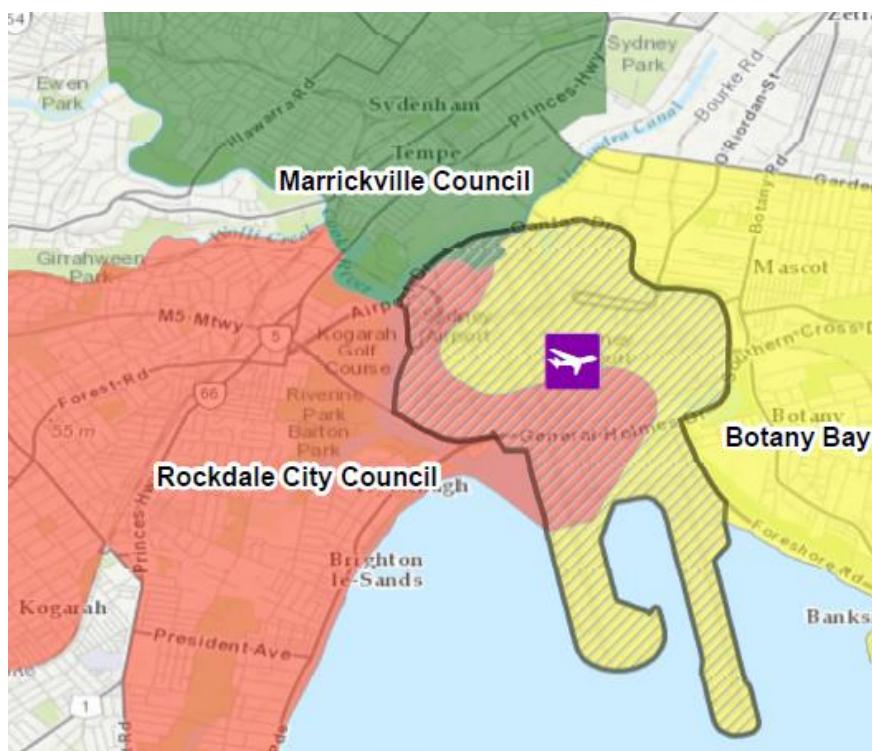


Figure 3.3: Sydney Airport Local Government Boundary Overlay

The master plan notes the need to improve east-west public transport access for commuters and exploring opportunities to strengthen the movements between subregions and bordering growth centres, such as Green Square. Green Square contains significant transport infrastructure that links Sydney's CBD and western Sydney with the airport but is currently underutilised^{lxxvi}. The master plan also notes the importance of the Mascot industrial area (located north east of the airport), which should be retained for industrial purposes.^{lxxvii}

Southern Sydney Employment Corridor

The Southern Sydney employment lands are located just three kilometres south of Sydney CBD and are located between two major planned centres, being Green Square Town Centre to the north and Mascot Station Precinct to the south, and contains the major transport corridor between Sydney CBD and the Sydney Airport and Port Botany (see Figure 3.4). It contains in the order of 300,000 jobs across a range of high value sectors including finance, insurance, business and technical services, education, technology, media, retail, arts, entertainment and tourism services^{lxxviii}. The area is shared by City of Sydney and Botany Bay Councils along with Marrickville and Rockdale Councils^{lxxix}.

The SGS (2013) report into the Eastern Sydney Local Government Review noted the changing economic geography of this region, which is increasing in complexity and economic value. Greater high density development and ongoing gentrification are underpinning the transformation of this South Sydney area resulting in an increasing take-up of traditional industrial space by non-traditional industrial occupiers^{lxxx}. There is a trend for greater white collar activities or professional services to co-locate in this area along with a mix of transport, manufacturing, retailing, warehousing and variety of service sector activities (as well as new residential development). It is expected that traditional industrial uses in this area such as manufacturing and warehousing are expected to decline while professional service sectors such as financial and insurance services and professional, scientific and technical services are expected to see continued and rapid growth^{lxxxi}.

Given the precinct's proximity to the CBD, Sydney Airport, Port Botany and important road corridors which underline the ongoing strategic importance of South Sydney as an industrial hub^{lxxxii}, the City of Sydney Council adopted (June 2014) an employment lands strategy which covers the Southern Sydney employment lands corridor. The strategy recognises the importance in retention of significant strategic industrial lands to accommodate future employment and economic growth.

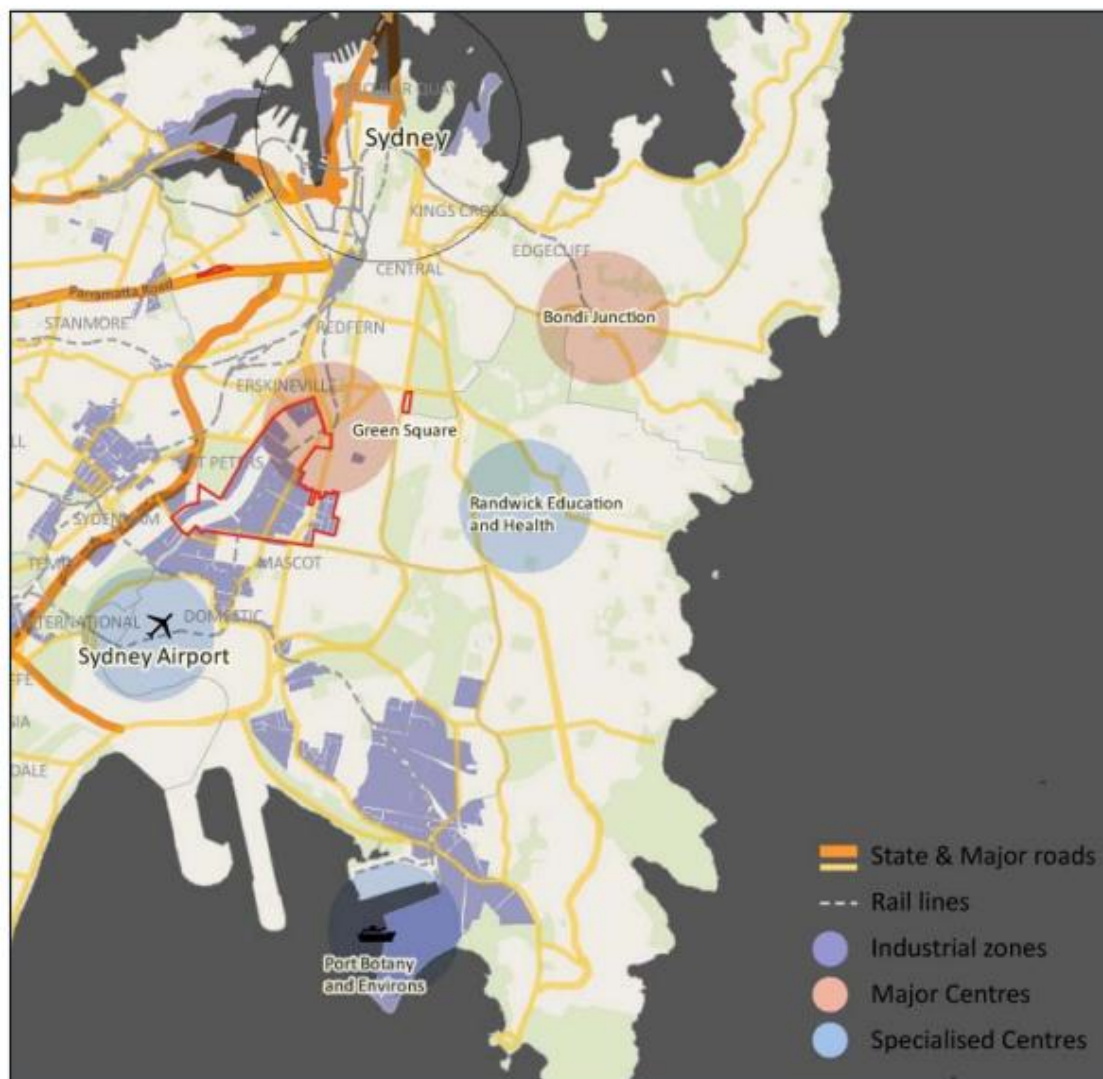


Figure 3.4 Southern Employment lands in context Source: City of Sydney Employment Lands Strategy (2014)

Green Square

The Green Square Urban Renewal Area encompasses one of Central Sydney's most significant urban renewal projects and is an identified strategic centre in the NSW Government's (2014) 'A Plan for Growing Sydney'. The development area is 278 hectares and includes the suburbs of Beaconsfield and Zetland and parts of Rosebery, Alexandria and Waterloo. 10,000 apartments are due for completion over the next 4 years and a new town centre (to be built next to the Green Square train station) is to consist of 90,000m² of commercial and retail area. The town centre will be a commercial, retail and cultural hub for the Green Square area and will feature a new aquatic centre, library, child care centre and a new park.

Sydney Central Business District & Barangaroo

Barangaroo is a major renewal project comprising a 22 hectare precinct divided into three project areas: Barangaroo Point, Central Barangaroo and Barangaroo South. The commercial core of Barangaroo 'Barangaroo South' is located on the southern portion of the site and will be a major

new extension of the Sydney CBD providing premium grade office floor space to accommodate international banks, financial and professional services^{lxxxiii}. The Barangaroo South development is expected to accommodate approximately half of the forecast 30,000 new jobs in the Northern CBD in the next 10 years^{lxxxiv}.

Summary of key employment areas and centres applicable to the study area

Key employment centre	Key facts
<i>Green Square</i>	Since 2000, approximately 11,000 new residents have settled in the area; by 2030 there will be capacity to accommodate about 53,000 residents and 22,000 new workers ^{lxxxv} .
<i>Global Sydney: Central Business District (CBD)</i>	CBD: Around 330,000 jobs (14 percent of all Sydney jobs) are located in the CBD. This is forecast to increase to 417,000 in 2031, a 27 percent increase. About 50 percent of this growth will occur in the northern part of the CBD ^{lxxxvi} .
<i>Barangaroo</i>	Barangaroo: Forecasts indicate that some 23,000 people will live or work in Barangaroo and another 33,000 people will visit the precinct every day ^{lxxxvii} .
<i>Southern Sydney Employment Corridor</i>	The Southern Sydney employment lands located just three kilometres south of Sydney CBD, contains in the order of 300,000 jobs across a range of high value sectors including finance, insurance, business and technical services, education, technology, media, retail, arts, entertainment and tourism services ^{lxxxviii} .
<i>Sydney Airport Precinct</i>	Sydney Airport handles around 37 million domestic and international passengers per annum. It projects that by 2033 the airport will accommodate about 74 million passengers and 1,011,000 tonnes of air freight ^{lxxxix} . Sydney Airport directly and indirectly generates 283,700 jobs, including 160,000 direct jobs. This is forecasted to increase to 400,000 by 2033 ^{xc} .
<i>Randwick Education and Health Strategic Centre</i>	In 2011, the centre recorded 14,371 employed persons. This is forecasted to increase to 18,953 persons by 2031 ^{xcii} .
<i>Royal Randwick Racecourse</i>	Employs over 2000 full-time and casual staff ^{xciii} .
<i>Port Botany Precinct</i>	Port Botany is Australia's second largest port in terms of freight volumes (behind Melbourne) with about 1.3 million Twenty-foot Equivalent Units (TEUs), expected to grow to around six million by 2031 ^{xciv} .
<i>Bondi Junction Strategic Centre</i>	Bondi Junction is a major retail and commercial centre providing regional services and employment for the Eastern Suburbs. Westfield shopping centre caters for 58,000 people a day ^{xcv} . In 2011, there were approximately more than 12,000 persons employed in the centre. This number is forecasted to increase to around 15,190 persons employed in the centre ^{xci} .

Key commonalities and/or findings for Economic Activity and Employment

- All councils form part of or adjoins the southern global economic corridor and represent diverse economic specialisations
- City of Sydney GRP output significantly outweighs all other council areas with regards to GRP
- Waverley's key industry in terms of employment is in Retail and Trade, reflective of the significance Westfield Bondi Junction and associated retail has in the area
- City of Sydney and Botany Bay Councils share the Southern Sydney employment lands corridor
- Randwick and Botany councils share the economic zone of the Port and surrounding industrial activities
- Sydney Airport precinct is situated across three LGAs including Botany, Rockdale and Marrickville councils

Transport and Access

Corridors and urban structure

Accessibility within the eastern subregion of Randwick, Waverley, Botany Bay and Woollahra is relatively high, combining a hierarchy of major transport corridors linking key destinations, and a finer grain network of collector roads and local streets supporting local centres and multiple modes of travel. Major transport demand corridors traverse the subregion, including the north-south Anzac Parade, Botany Road and Eastern distributor corridors, a corridor between Randwick and Bondi Junction, and the east-west corridor of Oxford Street.

Travel patterns

Compared to the greater Sydney average, residents within the study area make a higher number of trips per day, and travel a shorter distance. The table below shows a comparison of trips per person in each council area, for all modes of travel and all purposes.^{xcvi} This is likely to reflect a predominance of travel within the eastern subregion and central Sydney, and a high degree of accessibility to work, services, schools, recreation and social activities within the study area.

	Trips per weekday	Trips per weekend	Total distance per day (km)	Average trip length (km)
City of Sydney	4.3	4.1	17.6	4.1
Woollahra	4.5	4.6	20.4	4.5
Waverley	4.9	4.3	20.9	4.3
Randwick	4.0	4.0	21.3	5.4
Botany Bay	3.4	4.1	23.8	6.9
<i>Sydney average</i>	<i>3.7</i>	<i>3.2</i>	<i>31.9</i>	<i>8.7</i>

Source: Household Travel Survey 2012/13

Public transport

Trains, buses and ferries service the north of the subregion while buses are the main public transport mode for the southern part of the sub-region^{xcvii}. Edgecliff and Bondi Junction are serviced by rail connecting the Sydney CBD and the rest of the Eastern Suburbs is serviced by an extensive bus network as the main mode of public transport. The City of Sydney's strategic transport strategy *Connecting our City* (2012) identified serious limitations within the current networks, particularly within the CBD, with both Wynyard and Town Hall train stations unable to accommodate projected jobs growth^{xcviii}. Randwick's Citywide Transport Study also identified growing demand and a critical need for rail-based public transport to key destinations within the LGA.

The CBD and South East light rail, soon to commence construction, will link the south eastern parts of the area, including the Randwick Hospitals Complex and UNSW, to Central station and Sydney CBD. The light rail service will commence in conjunction with a re-designed south-eastern bus network linking to the CBD and cross-regional destinations such as Leichhardt, Sydney University, Burwood, Hurstville and Bondi Junction. This reflects the NSW government strategy for a more networked and connected city, and the increasing demand for east-west connections and cross-regional routes serving the study area.

Walking and cycling

A network of cycle paths including regional and local networks as well as recreational routes cover the majority of the subregion, with a more dense network of routes and cycle friendly streets in the CBD and inner city. A notable exception is the cluster of industrial sites and the Airport and Port Botany precinct in the south of the study area. All Councils have cycle strategies in place, with the exception of Botany Bay whose strategy is currently being prepared. These strategies coordinate routes across LGA boundaries and identify key linkages, as indicated on the map. Randwick and the City of Sydney have dedicated learners' cycle parks in Heffron Park and Sydney Park respectively.



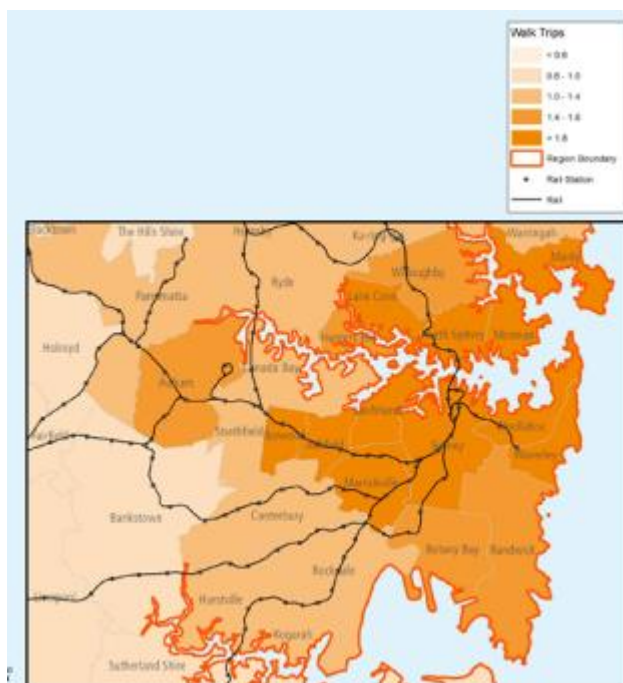
Figure 3.4 Map of cycle routes in the region

Across the study area the most common reason for choosing to cycle is for social and recreational purposes^{xcix}, consistent with the wider Sydney population, with average trip length of 5km. Notably, however, cycling for commuting purposes is increasing, and in particular for people living close to

their destination. Within the City of Sydney cycling for transport purposes is almost triple the state average, with trips for recreation and transport almost equally shared^c. City of Sydney cycle counts to and within the CBD indicate an overall 132% increase in commuter cycling between 2010 and 2014, with average daily trips exceeding 60,000. The Anzac Parade corridor has seen a 109% increase over the same period.

Walking in the study area shows the highest number of walking trips per person per day in the City of Sydney with 3.4 trips, falling to 2.3 and 2.2 in Woollahra and Waverley respectively, and down to 1.7 and 1.6 trips per day in Randwick and Botany Bay.^{ci}

This is likely to be a reflection of the relative densities in each council area, the permeability of the local road network, and the range of distances between residential areas and local centres, employment destinations and recreational activities. The less permeable and more suburban structure of the southern parts of the study area in Botany Bay and the south of Randwick City creates greater separation between residences and destinations.



(Source: BTS: Active Transport in Sydney – Walking 2013)

For commuting purposes, the strategic centres of Sydney CBD, Bondi Junction and Randwick Education and Health precinct all enjoy a relatively high proportion of people walking to work at 6%, 9% and 14% respectively. In Port Botany and Sydney Airport, this mode share falls to 2%.^{cii}

Walking for recreational purposes is supported by key regional open space assets, including Centennial Parklands, beaches, coastal reserves and National Parks in Botany Bay and the Sydney Harbour foreshore. A regionally recreational walking path will ultimately provide a continuous coastal walkway extending from north Bondi to Botany Bay.

Freight

In the southern part of the region freight movements make up a small but significant proportion of trips by road and rail. The South Sydney Area with its mix of activities is creating some significant transport challenges. Notwithstanding the aims to increase the share of port freight being distributed by rail from the port, and to increase public transport mode share for jobs, road transport of all types is still dominant (and set to increase).

Employment containment

The employment containment rate refers to the proportion of employed residents living and working in the area. The following table of journey to work data in the region demonstrates the high proportion of residents who live and work in the region. Overall employment containment is similar for each LGA, with the eastern suburbs council areas showing similar distributions of residents employed within their own LGA or elsewhere within the study area.

	Live and work in same LGA	Work in rest of study area	Total containment
City of Sydney	59.7%	8.6%	68.3%
Woollahra	20.5%	55.1%	75.6%
Waverley	20.1%	52%	72.1%
Randwick	24.9%	47.2%	72.1%
Botany Bay	23.4%	46.5%	69.9%

Employment within the Eastern Suburbs of Waverley, Woollahra and Randwick LGAs is concentrated within the major employment centres of Bondi Junction and the Randwick Education and Health Precinct. These two centres have a high concentration of retail, health and education employment and this is reflected by high levels of self-containment within these industries^{ciii}. The SGS economic profile noted that 'a high proportion of people who work in the Randwick Health and Education precinct live in Randwick or the adjacent suburbs. A high proportion of residents also travel from the suburbs around Maroubra and the south of the Eastern Suburbs to work in this precinct^{civ}.

Key commonalities and/or findings for Transport and Access

- Overall high level of accessibility within the study area
- The major employment centres within the Eastern Suburbs are Bondi Junction and the Randwick Education and Health Strategic Centre
- Within the study area there is a high proportion of short trips, with local/subregional containment of employment and other trip generators within a single or neighbouring council area
- High proportion of sustainable and active travel modes across the study area, with a decreasing trend from north to south, and with distance from Sydney CBD
- Randwick Education and Health Centre enjoys the highest proportion of people walking to work
- Increasing trend in cycling for transport and commuting purposes over short distances
- Increase in east-west and cross-regional travel in and out of the study area
- Airport/port congestion and conflict between travel demands – people vs freight

- Light rail and strategic bus corridors – future bus changes and new south eastern bus network

Housing & Liveability

The eastern subregion of Randwick, Waverley, Botany Bay and Woollahra is host to approximately 304,322 people and 137,200 dwellings. The population projection for this region is forecasted to grow to 379,750 people by 2031¹⁴. City of Sydney Council area is host to approximately 183,494 people and 102,250 dwellings. The population projection for Sydney City is forecasted to grow to 290,500 people by 2031.

Dwelling targets for each LGA (to accommodate the forecasted population growth) are to be set down by the new metropolitan plan 'A Plan for Growing Sydney', central subregion delivery plan which are yet to be finalised.

The following map illustrates the dominant dwelling types across the group of LGAs. It demonstrates the diversity in housing stock across the study area with higher density housing to the north of the area in and around town centres and major transport hubs such as the CBD, Kings Cross to Potts Point, Bondi Junction and North Randwick. In fact, 94.7% of the dwellings were medium or high density¹⁵ in the City of Sydney. Waverley also has a high share (80.7%) of dwellings that were medium or high density, followed by Woollahra (76.9%), Randwick City (70.2%) and Botany Bay (60.7%).

¹⁴ Source: Profile.id

¹⁵ 'Medium density' includes all semi-detached, row, terrace, townhouses and villa units, plus flats and apartments in blocks of 1 or 2 storeys, and flats attached to houses. 'High density' includes flats and apartments in 3 storey and larger blocks. For comparison, 40% of dwellings were medium or high density in Greater Sydney. Source: ABS Census of Population and Housing 2011

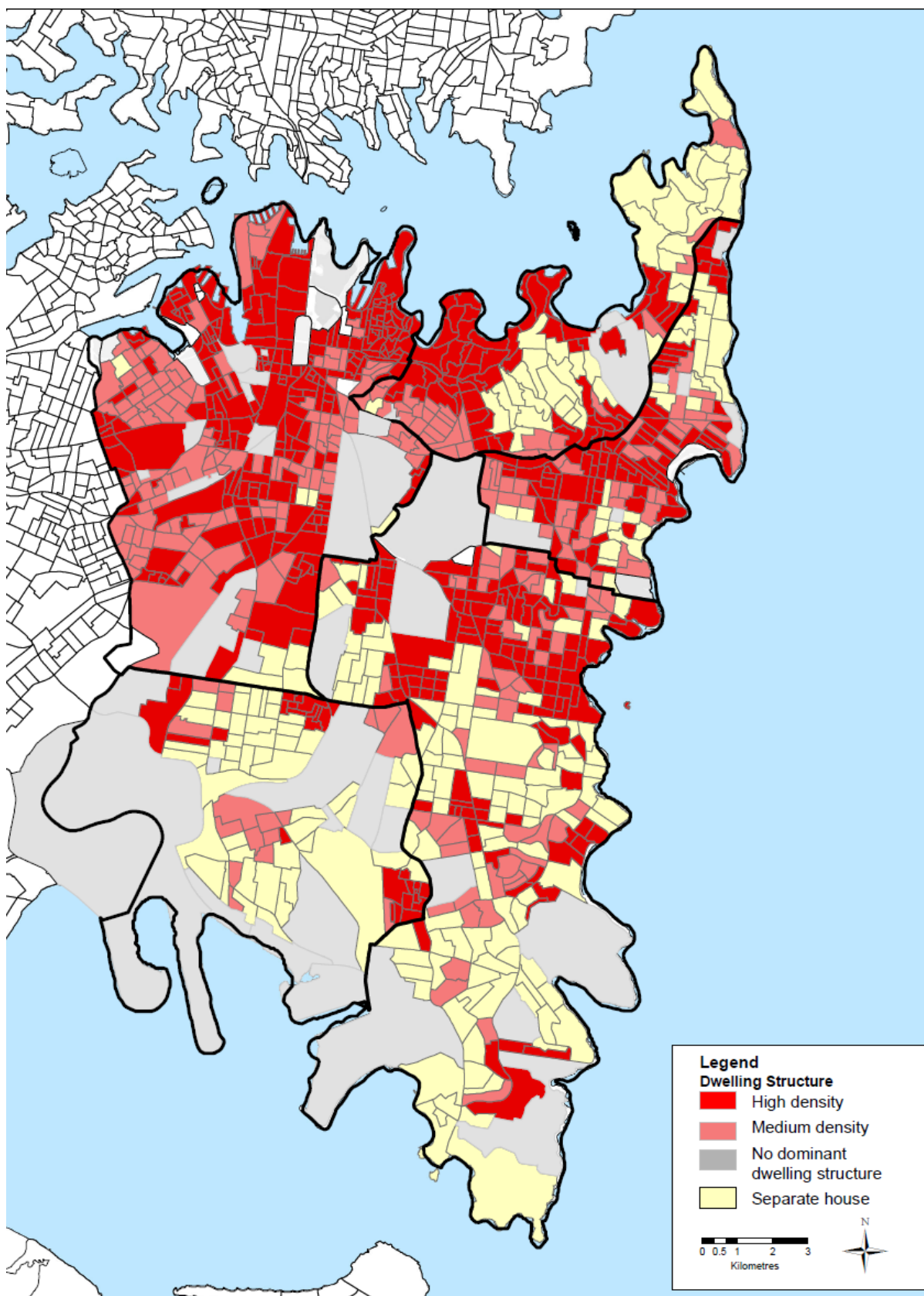


Figure 3.5 Dwelling Structure Source: ABS Census 2011 Population and Housing

Parts of Randwick and Botany Bay LGAs in particular contain relatively low density suburbs. Figure 3.6 shows the proportion of single dwellings in Metropolitan Sydney with a relatively high share in South Randwick and Botany Bay¹⁶. Botany Bay Council contains the highest proportion of public housing stock approximately 11% of total housing stock or 1,667¹⁶ is social housing. Followed by Randwick City, approximately 7.4% of the total housing stock or 3,800 social housing stock mostly in the south Randwick area; Waverley 467 social housing dwellings or 1.7% of the total housing stock; and Woollahra 77 social housing dwellings or 0.32% of the total housing stock.

FIGURE 16. PROPORTION OF SINGLE DWELLINGS IN METROPOLITAN SYDNEY

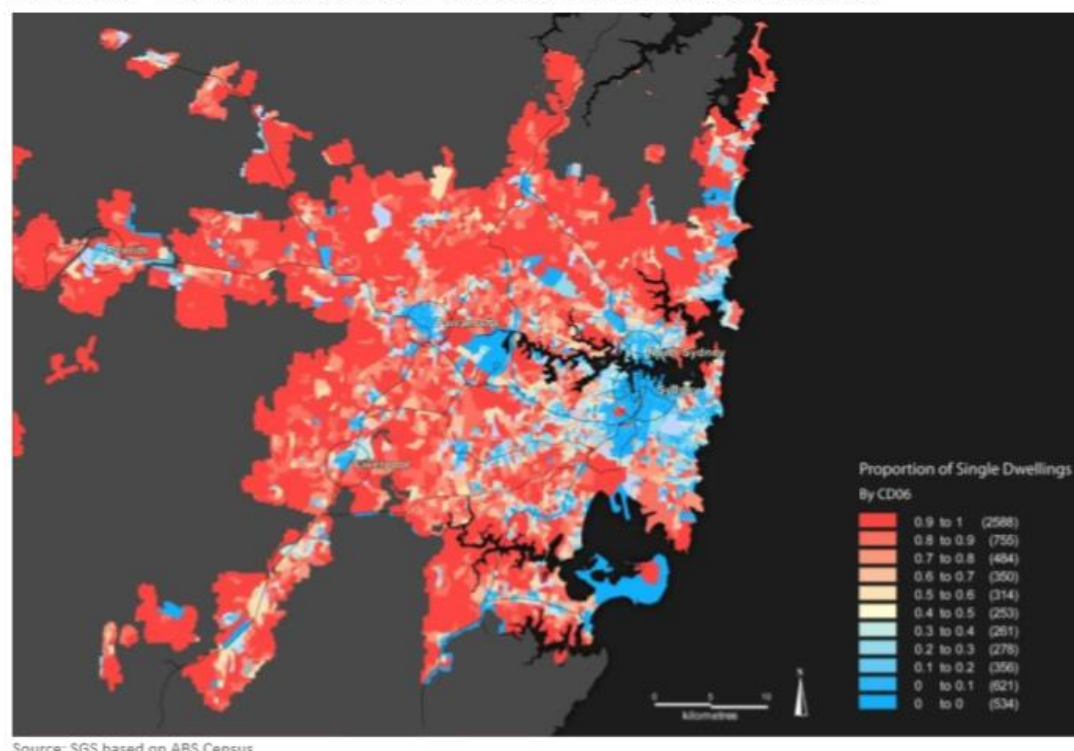


Figure 3.6 *Proportion of Single Dwellings in Metropolitan Sydney* Source: SGS (2013) *Eastern Sydney Local Government Review*

Housing supply

As noted in section 2 of this report (under the state and local planning framework) the government's focus for future housing supply is to be targeted in strategic centres, transport corridors, (surplus) government land and areas identified for urban renewal. The City of Sydney has several key residential projects underway including Green Square, Central Park, Harold Park, Barangaroo and Victoria Park which are providing a significant proportion of housing supply.

The following table provides a summary of residential development activity across the LGAs for the financial year of 2013/2014. The data has been obtained from the Department of Planning and Environment Metropolitan Development Program.

¹⁶ Source: HousingNSW September 2014.

Residential activity (2013/14)	City of Sydney	Botany Bay	Waverley	Randwick	Woollahra
New dwellings approved	2470	2041	670	493	359
% Dwellings approved that are multi-unit	95%	98%	88%	72%	15%
Net dwellings completed	2578	710	61	544	9
% Net dwellings completed that are multi-unit	98%	97%	97%	98%	11%

Source: Metropolitan Development Program – Department of Planning and Environment

The largest growth in terms of dwellings completed within the group of councils is the City of Sydney and Botany Bay Councils, which has the unique advantage of having a number of major urban renewal sites for large-scale brownfield and transit oriented development. The Mascot Station Town Centre Precinct Masterplan was completed in April 2012 and the precinct is the focus for increased population growth in the City of Botany Bay^{cvi}.

The overwhelming majority of the newly completed dwellings are in multi-unit form for City of Sydney, Randwick, Botany Bay and Waverley councils. It is expected that medium to high density residential development would be the primary form of new housing supply in the future.

The SGS (2013) report into the Eastern Suburbs local government review noted that while Eastern Sydney (Randwick, Waverley and Woollahra) do not have the industrial and commercial areas that might turnover in the same way as the City of Sydney or Botany Councils, the underlying fundamentals of development (land values and price points) support continued change in Eastern Sydney and pressure for higher density residential development is likely to intensify^{cvi}. Access to a significant share of Sydney's employment and high amenity values (proximity to the beach, services and shops) underpins these high land values^{cvi}.

Supply of affordable housing

Delivery of not only enough housing but the right type of housing including affordable housing is essential to meet Sydney's growing population. Population growth will drive demand for additional housing, and particularly affordable housing close to employment areas^{cix}. The City of Sydney, Randwick and Waverley Councils have identified the need for affordable housing to be provided in their community. These councils have developed specific affordable housing policies and strategies to facilitate the retention and supply of affordable housing in their communities. Without provision of more affordable forms of housing, the market can be expected to continue to produce more

expensive housing in the area, so that housing will only be affordable to households on relatively high incomes. Lower income households would need to move out of the area or may be prevented from finding housing in the area close to new employment opportunities^{CX}.

Key Commonalities and/or findings for Housing

- The City of Sydney contains a significant share of higher density housing when compared to the rest of the council areas, along with Waverley, parts of Woollahra (specifically Edgecliff) and Randwick to the north
- A high share of single dwelling housing stock is found to the south of Randwick and parts of Botany Bay council
- Both the City of Sydney and Botany Bay Councils have significant urban renewal projects underway; and have contributed the largest share of dwelling supply and dwellings approved for 2013/14
- The majority of all new dwellings completed for Randwick, Botany Bay, Waverley and the City of Sydney Councils are multi-unit housing. It is expected that medium to high density residential development would be the primary form of new housing supply in the future.
- The City of Sydney, Randwick and Botany Bay Councils contain a high share of social housing stock
- Randwick, Waverley and City of Sydney Councils have identified the importance of providing affordable housing in their communities and each of the councils have dedicated affordable housing strategies and policies in place to facilitate the retention and supply of affordable housing in their communities.

Social Infrastructure & Liveability

Community Services & Programs

A local council's day to day functions of policy-making, planning, provision of physical services and regulatory responsibilities have evolved over time to include the management of essential community facilities and services. Local councils are best placed (of the three sphere of governments) to identify and respond to their communities' needs, and have been doing so for several decades. This level of responsiveness has translated into Councils adopting different responses to locally articulated needs. While there is a criticism that local governments lack uniformity, it is in essence that which helps local councils sustain its unique role as a responsive provider of key services.

Local councils implement a range of community services that are underpinned by social justice principles and a desire to create inclusive societies. These include delivering direct services to residents in need of support, or provide 'top up' financial assistance to established organisations that are already delivering these services so that they can better meet the clients' needs.

The method adopted by different councils in the eastern suburbs in the funding and delivery of social and community services extend to services such as Meals on Wheels, Home Maintenance and Modification Scheme, Community Centres, Children's services, and various community development activities and events.

For example, Botany Council operates a Meals-on-Wheels service to Home and Community Care (HACC) clients; while Randwick Council provides a Home Maintenance and Modification Service to HACC clients to residents residing in Randwick and Waverley LGAs.

This is because there is a need to meet this identified service gap as a result of the increasing number of ageing residents who chose to remain in their own homes, and have the ability to do so after minor modifications have been carried out. The Council does not manage a Meals-on-Wheels service because the Randwick Meals-on-Wheels service, a non for profit organisations established some 40 years ago already provide this service to Randwick City residents.

Waverley Council operates a stand-alone and fully staffed community centre in Bondi Junction from which to provide direct community development activities and services to residents. In contrast, Randwick Council's approach is to facilitate and support established community based and not-for-profit organisations to deliver much needed services to their clients through its grants and subsidies programs, worth \$1.5M per year. Such an approach is in part historical, and in recognition of the valuable role of service providers in delivering much needed support services to its residents.

In addition, Randwick Council also offers around 150 educational and recreational programs, events and activities to its residents of different age groups. These activities are being delivered by the different work units across the council.

Woollahra Council has adopted a similar approach to Randwick Council in that it does not provide direct social services but make an annual financial contribution to the Holdsworth Community Centre (a not for profit organisation) to provide community services and programs to its residents.

In addition to implementing its own community programs, members of the eastern suburbs local councils also actively collaborate with each other to participate in joint services planning meetings, and run a range of activities for various community groups. The pooling together of resources has resulted in improved participation rates and social inclusion activities/events delivered in a cost effective way. Examples of projects that are jointly delivered to eastern suburbs residents are domestic violence prevention projects, mental health awareness raising workshops and environmental sustainability activities. The fact that the eastern suburbs councils share similar demographic characteristics and cultural values is an obvious reason to pool resources together to address identified needs and service gaps in a more strategic manner.

Educational Establishments

The following map (figure 3.7) illustrates the number and distribution of educational establishments including primary schools, high schools, and tertiary institutions (Tafe and universities) across the study area. Three out of six Sydney universities are located in Central Sydney.

Randwick City contains the highest number of educational establishments of the study area including 36 primary and high schools (both government and non-government). The University of NSW, Randwick College and Tafe are also located in Randwick. The Department of Education and Communities have noted in relation to Randwick LGA that there is significant projected enrolment growth in Government primary and secondary schools to 2031. This is being driven by infill development and as families move into the area. In relation to Waverley LGA, there is some projected enrolment growth in Government primary and secondary schools in the Waverley LGA to 2031, and negligible growth in Woollahra LGA. The school sites across the three LGA areas are

usually small and some are within areas of high traffic volumes. In relation to Botany Bay LGA, there is projected enrolment growth in Government primary and secondary schools to 2031. While this is not to the levels projected for the Randwick LGA it is still substantial.

The Department of Education and Communities also note an increasing number of public secondary school students living across inner Sydney for at least the next 12 years^{cxix} and undertook community consultation last year to help develop a public secondary school education strategy for the inner Sydney area. Note the inner Sydney area largely includes the local government areas of the City of Sydney, Leichhardt and Marrickville. In addition to the needs of public secondary school education, a review in 2013 into the public education needs of primary-aged school students (specifically in the Ultimo/Pymont area), recommended that a new larger primary school be developed in the area^{cxii}.

Demographic drivers which impact on school-age projections and hence demand for schools in an area include changing demographics, an increasing population and a growing number of families with school-age children settling in the area.

The NSW Government (2014) 'A Plan for Growing Sydney' identifies that new and expanded school facilities will be needed in urban renewal areas, greenfield sites and throughout established urban areas, to meet population growth. The plan specifically states (under Action 1.10.1) that the NSW Government is to assist the Department of Education and Communities, the Catholic Education Commission and the Association of Independent Schools of NSW to identify and plan for new school sites throughout Sydney.

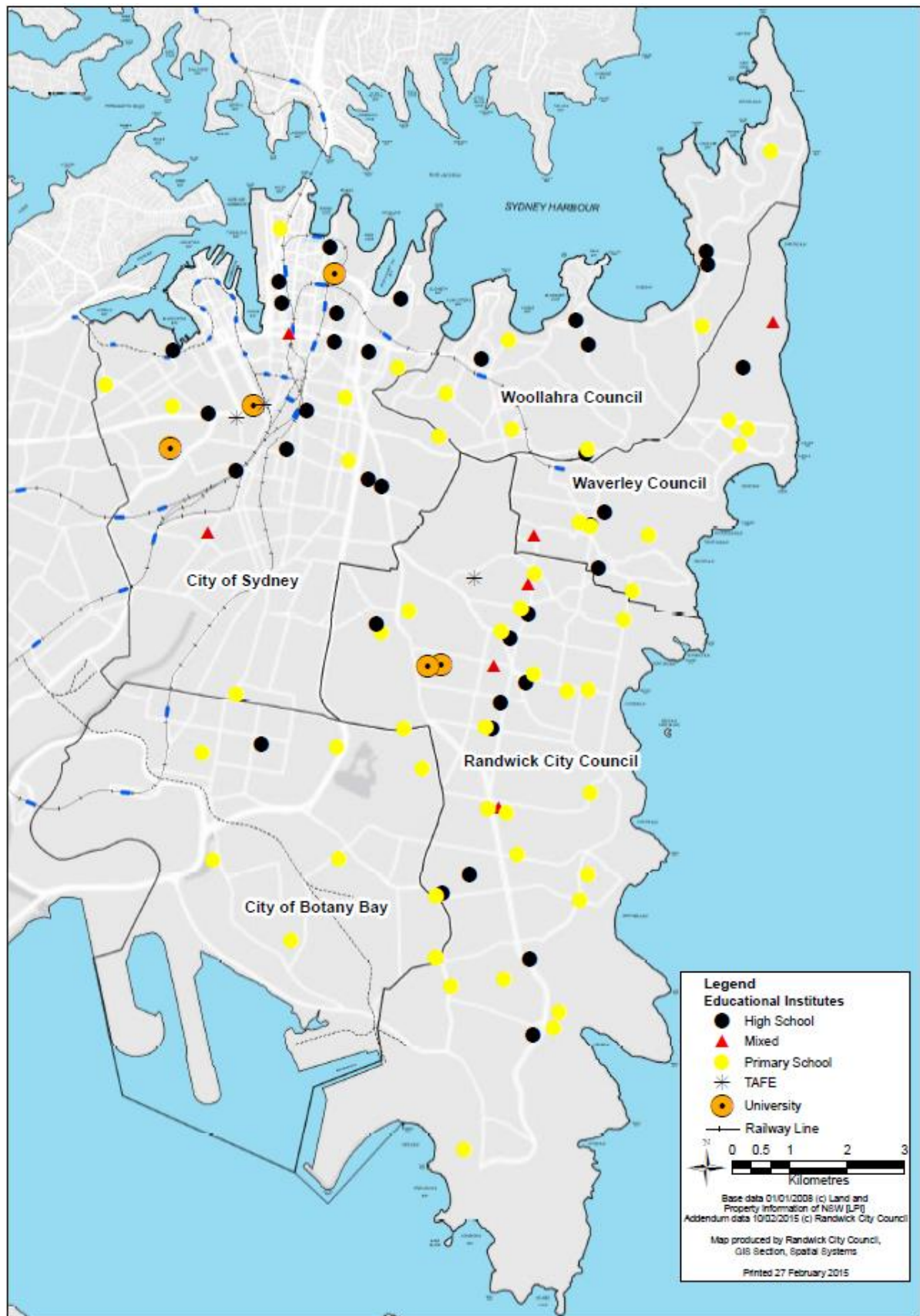


Figure 3.7: Distribution of Educational Establishments across the study area

Hospital and Health Service

NSW Health is a key provider of a diverse range of services in the study area. The Northern sector of the South Eastern Sydney Local Health District (SESLHD) covers six LGAs including Sydney (part), Woollahra, Waverley, Randwick, Botany Bay and even Lord Howe Island. The following lists the hospitals in this sector relevant to this report.

Randwick City Council	Prince of Wales Hospital
Randwick City Council	Royal Hospital for Women
Randwick City Council	Sydney Children's Hospital, Randwick
City of Sydney Council	Sydney Eye Hospital
Waverley Council	War Memorial Hospital (third schedule with Uniting Care)
Botany Bay	N/A

SESLHD also operates 28 Child and Family Health Centres, 12 Community Health Centres and nine Oral Health Clinics; providing prevention, early intervention and community-based treatment, palliative care and rehabilitation services.

As part of the Randwick Hospitals Campus, Sydney Children's Hospital, Randwick is also located in the study area. It forms part of the Sydney Children's Hospitals Network, providing a comprehensive range of services in paediatric and adolescent medicine and surgery.

The SGS (2013) report into the economic profile of the Eastern Suburbs region noted that the population aged above 65 in Eastern Suburbs are projected to grow by 40% from 2011 to 2036^{cxiii}. An increasing trend towards ageing in place will increase the proportion of retirees living in the region and will increase demand for health related services^{cxiv}.

The Sydney Regional Plan (2013) noted that while the Central Subregion¹⁷ has the highest number of hospital beds, the Central Subregion has several of the major hospitals within it that serve not only the Sydney Metropolitan Region but the whole of the State^{cxv}.

Key commonalities and/or findings for Social Infrastructure and Liveability

- All councils provide various community services and social inclusion programs.
- The Northern sector of the South Eastern Sydney Local Health District provides hospital and health related services across all councils in the study area.

¹⁷ Here the central subregion includes Ashfield, Botany Bay, Burwood, Canada Bay, Hunters Hill, Lane Cove, Leichhardt, Marrickville, Mosman, North Sydney, Randwick, Ryde, Strathfield, Sydney (City of), Waverley, Willoughby, Woollahra, as defined by the previous draft metropolitan Strategy for Sydney 2031, which was applicable at the time the Sydney Regional Plan was released in August 2013.

- Randwick contains the highest number of educational establishments (from primary to tertiary) compared to the rest of the councils.
- Demographic drivers such as school-age projections, an increasing population and a growing number of families with school-age children settling in the inner Sydney area is creating a demand for primary and secondary school education in the area.
- In Randwick LGA there is significant projected enrolment growth in Government primary and secondary schools to 2031
- The population aged above 65 in Eastern Suburbs are projected to grow by 40% from 2011 to 2036

Parks and recreation

Open space can be broadly divided into regional, district and local according to the sizes of user catchment. It can be further classified according to specific functions into passive parks, sports fields, civic spaces, environmental conservation land, access and linkages^{cxvi}.

The following map (Figure 3.8) provides a snapshot of open space and recreational facilities within the study area. There are approximately 2,300 hectares of open space (around 20% of the total area) across the five LGAs. Of the total open space, about 75% is regional open space, which reflects the wide user catchment of most open space assets in the area (e.g. Darling Harbour, Royal Botanic Gardens, Centennial Park, Randwick Racecourse, golf courses and beaches).

There are a total of 13 golf courses in the study area and five are located in Randwick. Sports fields are largely scattered across the LGAs and are generally available at the district or neighbourhood levels. Remnant bushland is concentrated in Woollahra and Randwick, in particular along the coast in Botany Bay National Park, Sydney Harbour National Park and Commonwealth owned lands at Malabar Headland.

Urban parklands (passive parks) make up the largest percentage of open space within the study area (close to 40%), followed by golf courses (approx. 20%) and sports fields (approx. 18%). With more than a quarter of the Randwick city area designated for open space and recreational uses, Randwick provides more than 50% of the open space in the study area.

In addition to sports grounds, golf courses and passive parks, a variety of boating facilities are also provided to meet the diverse recreational needs of residents and visitors. These are usually provided in or adjacent to beaches, foreshore parks/reserves and major destinations/attractions. As shown in the following map (Figure 3.9), these facilities are mostly located in City of Sydney and Woollahra. Six can be found in Randwick, one in Botany Bay (on Port lands) while Waverley does not have any such facilities.

The above analysis indicates that Randwick, Waverley and Woollahra share many commonalities in their foreshore character and usage. This can be demonstrated by the similar types of open space and natural coastal landscapes (e.g. national parks, golf courses, remnant bushland, cliffs, beaches and foreshore parks) and the wide range of recreational opportunities and activities generally available along the foreshore of the three councils, such as fishing, boating, coastal walks, swimming and golfing.

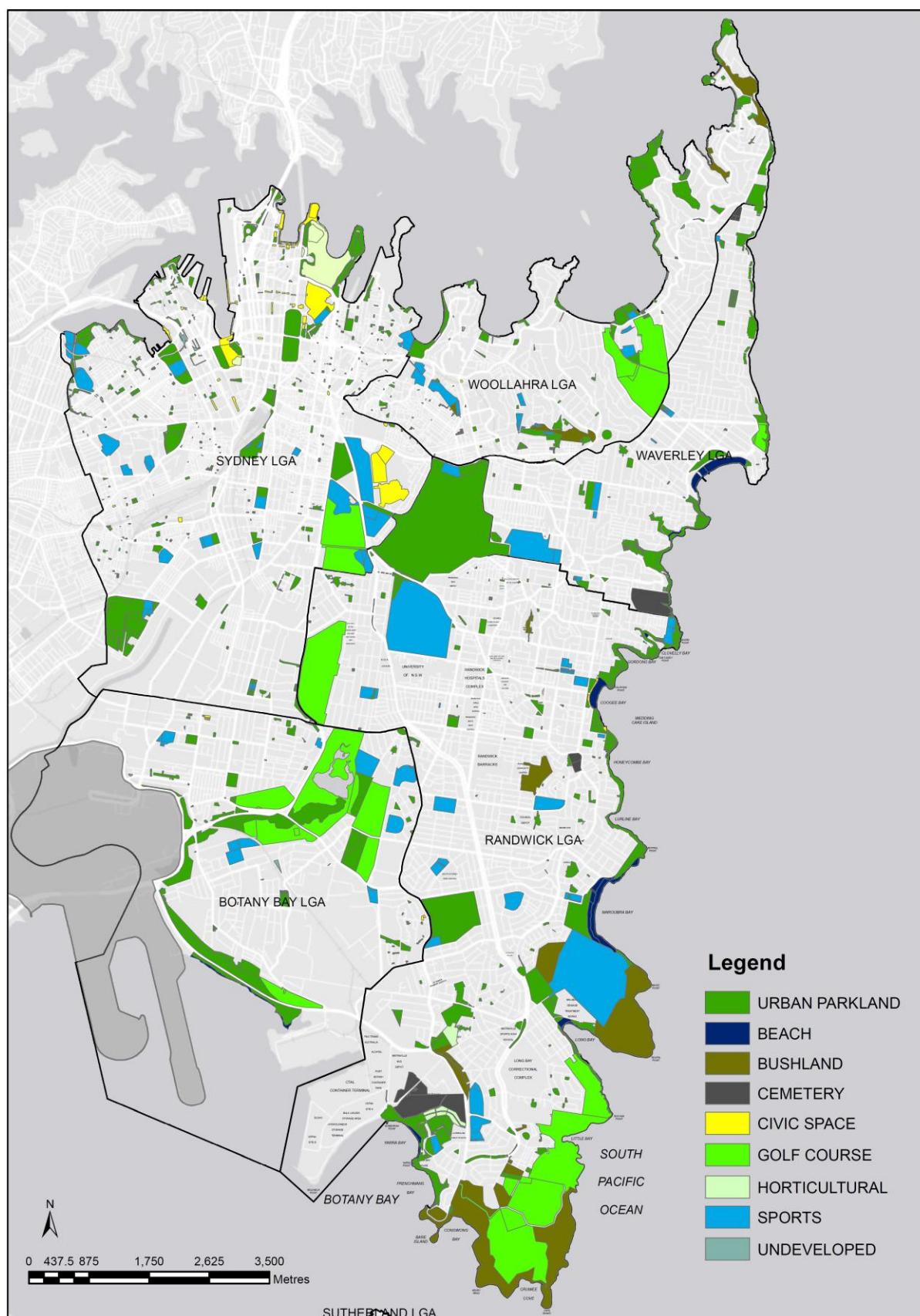


Figure 3.8: Open space assets in the study area

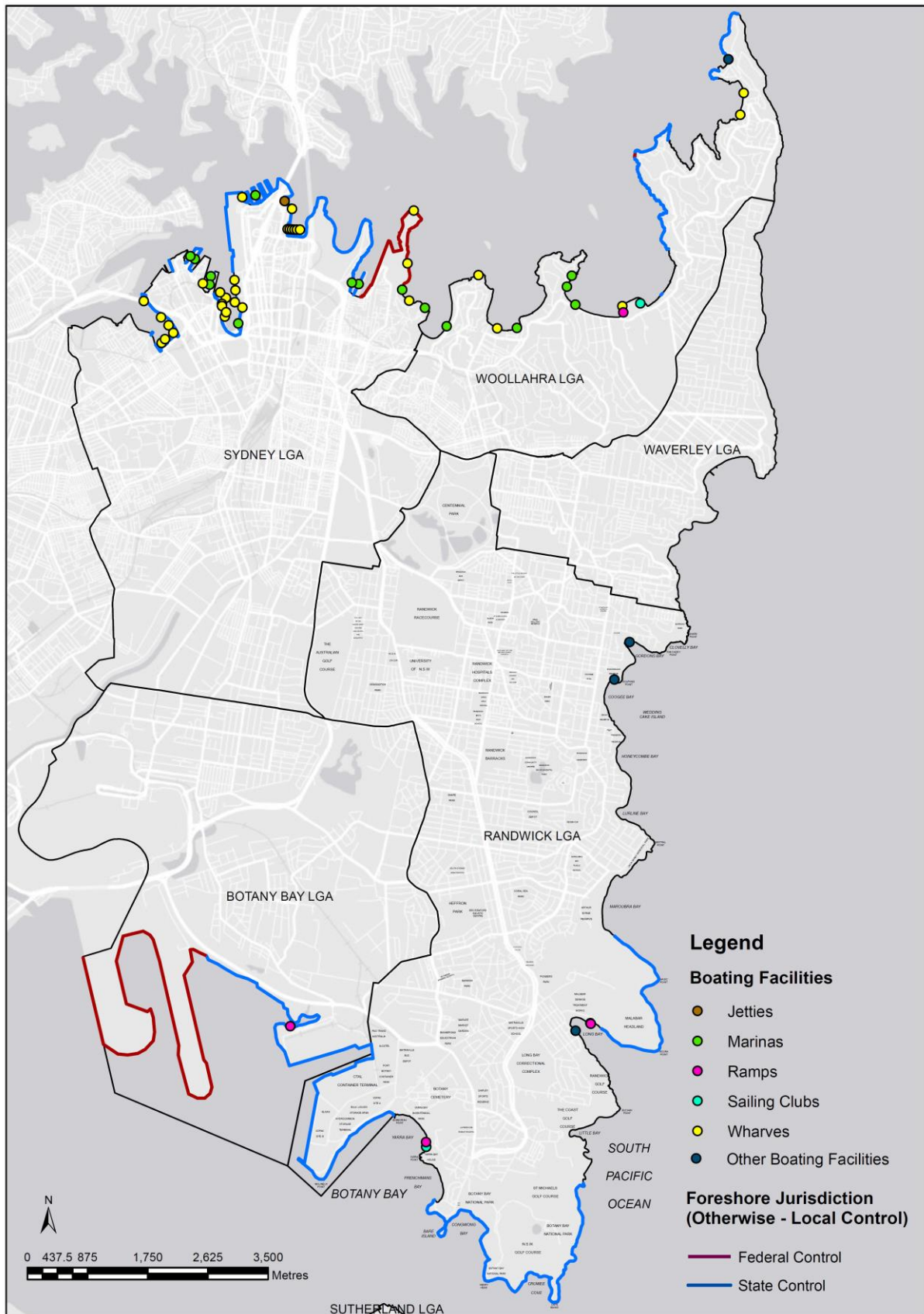


Figure 3.9: Locations of boating facilities in the study area

As noted above, a significant proportion of the open space in the study area is regional open space, serving multiple LGAs or even whole of Sydney. In seeking recreational experiences, people are usually not confined by local government boundaries and regional parks (such as Centennial Park, Sydney Park and Hyde Park) are experiencing increasing numbers of visitations across Sydney, generating a substantial amount of cross-border flow^{cxvii}.

In recognition of this cross-border flow, the Metropolitan Greenspace Program (MGP) aims to improve linkages between regionally-significant open space and recreational facilities to form a green space network. The program, consistent with Direction 3.2 of the “Plan for Growing Sydney”, is being undertaken by the Department of Planning and Environment with input from local councils, to plan, coordinate and improve the regional open space network, which may include parks, reserves, tracks and trails.

There are a number of key open space corridors and linkages across the study area, including:

- Harbourside walk from Circular Quay to South Head, connecting numerous regional open space (e.g. Royal Botanic Garden, Rushcutters Bay Park, Woollahra Golf Course, Royal Sydney Golf Course, Sydney Harbour National Park and all beaches along the foreshore)
- Federation Track that extends from Rushcutters Bay through Paddington, Centennial Park, Queens Park to Waverley Cemetery
- Eastern Coastal walkway that stretches from South Head to La Perouse (with some gaps at locations, such as Lurline Bay, Malabar Headland and four golf courses south of Malabar Beach)
- Centennial Parkland, which extends across or adjacent to four LGAs, being City of Sydney, Randwick, Waverley and Woollahra
- Green links under Waverley’s Green Links Pedestrian Network, including routes that connect Centennial Park, Bondi Junction and Bondi Beach, connect Bondi Junction with Queens Park, connect Queens Park to Bronte Beach, connect Bondi Junction with Tamarama Park (2 more green links are still under construction)
- Botany Wetlands, comprised of 11 interconnected ponds that stretch over a 4km- corridor (contained within the Botany Bay LGA, bordering Randwick LGA)

Major Visitor attractions

The visitor economy industry in NSW contributes over \$20.2 billion to the State's economy; supports more than 159,000 direct jobs, over 96,500 businesses; and accounts for one in every 22 jobs in NSW^{cxviii}. Both the state plan and the new metropolitan plan for Sydney identify the visitor economy (tourism) as a priority industry for growth.

The City of Sydney is host to seven of Australia’s top ten attractions, major events and sporting events attracting visitors from around the world, including Sydney New Year’s Eve, Vivid Sydney, the AFC Asian Football Cup (in 2015) and the ICC Cricket World Cup^{cxix}. In 2013-2014 Sydney hosted 2.8 million international visitors and \$5.5 billion dollars is spent by overnight visitors to the city annually^{cxx}.

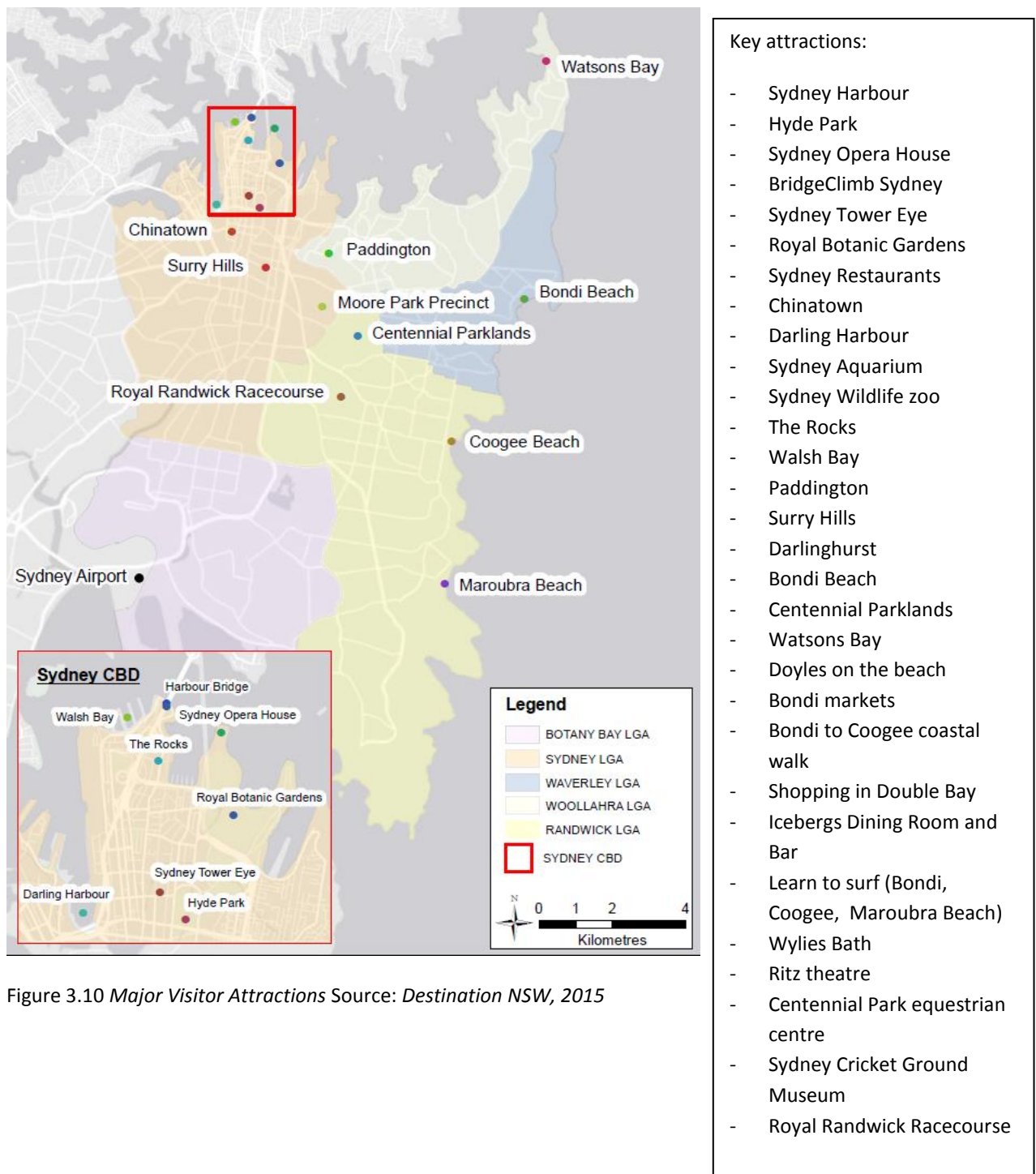
Moore Park located in the City of Sydney and adjoining Randwick City Council, is an important sports and events precinct which is home to the Sydney Cricket Ground, Sydney Football Stadium,

exhibition facilities at the Hordern Pavillion and Royal Hall of Industries and shopping and dining in the Entertainment Quarter. Events in this precinct attract high numbers of people. The NSW Long Term Transport Master Plan (2012) identified that more than 488,000 people attend the SCG each year for AFL and cricket matches; more than 668,000 attend football matches at the Sydney Football Stadium; and a further 280,000 attend events and concerts at Hordern Pavilion. The master plan also noted that these high numbers of people coming to the precinct generate congestion along the Randwick corridor during major events^{cxix}. One of the actions outlined in 'A Plan for Growing Sydney' (specifically for the Central subregion) is to 'Improve the accessibility of cultural and recreational facilities outside the Sydney CBD, such as the Moore Park sporting and entertainment precinct'. The CBD to south east light rail project will be instrumental in facilitating this action and will also connect the Moore Park entertainment precinct to Royal Randwick Racecourse.

The Royal Randwick Racecourse located within Randwick City Council is a major visitor attraction in the eastern suburbs and is considered to be a cultural landscape of State heritage significance^{cxix}. The racecourse is managed by the Australian Turf Club, is home to some of the state's most important horse racing events and other feature events including the future music festival and the 2008 World Youth day. Royal Randwick has recently undergone a \$150 million redevelopment of a new six-level grandstand^{cxix}. In addition to the redevelopment, a 170 room 4 star apartment hotel has also been approved on site due for completion in 2019.

The Eastern Suburbs of Woollahra, Waverley and Randwick also features an extensive coastline, including some of Sydney's and Australia's most popular and best known beaches such as Watsons Bay, Bondi, Tamarama, Bronte, Coogee and Maroubra. Bondi Beach is a major destination for tourists and Sydney residents. The average number of visitors to Bondi per annum over the past three years was over 2.2 million^{cxix}. Increasing numbers of events and attractions such as the Sculpture by the Sea, surfing competitions and the weekly Sunday markets makes Bondi beach a significant cultural role in the region. Similarly, Randwick City Council alone has 9 beaches in the area. Visitation numbers to beaches in Randwick City, for the 2013-2014 financial year recorded a staggering 9.7 million people. Other key events held in Randwick City Council include New Years Eve and Australia Day festivities at Coogee Beach.

The following map illustrates the major visitor attractions across the study area.



Visitor accommodation

Accommodation is important to the success of the visitor economy. Visitors need appropriate places to stay and the benefits to local economies in these areas include local employment opportunities, local businesses and support for key institutions such as Universities, sport facilities and hospitals.

The NSW Trade and Investment commissioned a study into the visitor accommodation industry by Jones Lang LaSalle in 2014 and the key findings of this study were:

- East Sydney¹⁸ has the most diverse accommodation market with properties of all grades represented. This in part reflects the close proximity of these markets to Sydney CBD and the Sydney International Airport precinct.
- The East Sydney market comprises around 1,501 accommodation rooms (in 2012). Very few projects are currently planned in East Sydney except for those which are already under construction.
- The East face competition for sites from alternate uses notably residential apartment. This has been a noticeable trend in Sydney's East and North regions over the past decade with a number of hotels closed for residential conversion.
- The majority of accommodation rooms in East Sydney are located in Bondi (557 rooms), Coogee (472 rooms) and Randwick (437 rooms)
- The highest proportion of hostels are found in the suburbs of Bondi (5 hostels, 671 beds, 44.0% of total supply), Coogee (2 hostels, 94 beds, 6.2% of total supply), and Manly (3 hostels, 288 beds, 18.9% of total supply) when compared to the Sydney Metropolitan backpacker/hostel market.
- The Sydney City accommodation market now comprises around 20,000 accommodation rooms^{CXXV}.
- Hotels continue to account for the largest proportion of visitor accommodation within the City of Sydney, with major hotels located in the CBD and Ultimo Pyrmont accounting for more than 65% of the total number of hotel rooms^{CXXVI}.

Key commonalities and/ or findings for Parks and Recreation

- The boundaries of the Centennial Parklands are across or adjacent to four LGAs including the City of Sydney, Randwick City, Waverley and Woollahra.
- Randwick and Waverley are host to popular beaches and visitor attractions which draw a significant number of local and international visitors.
- Recreation in the study area is characterised by a substantial amount of cross-border flow.
- Randwick, Waverley and Woollahra share similar foreshore character, providing similar types of recreational opportunities along the foreshore.
- Coastal and harbourside Walk extend and connect the foreshore and key destinations/attractions of City of Sydney, Woollahra, Waverley and Randwick.
- Inland track (Federation Track) runs across Woollahra, Randwick and Waverley, linking Rushcutters Bay Park, Trumper Park, through Centennial Park, Queens Park to Waverley Cemetery.
- The CBD and south east light rail will connect three key visitor attractions including Sydney Cricket Ground, Entertainment Quarter (Moore Park) and the Australian Turf Club, across Randwick City and City of Sydney councils.
- The majority of accommodation rooms in East Sydney are located in Bondi, Coogee and Randwick.
- Both Bondi (Waverley Council) and Coogee (Randwick City Council) contain the highest proportion of hostels when compared to the Sydney metropolitan backpacker/hostel market.

¹⁸ East Sydney is defined in the study as comprising the local government areas of Waverley, Woollahra and Randwick

Planning Systems

This chapter provides an overview of the planning framework across the five council areas, with a particular emphasis on Randwick City Council. It looks at Environmental Planning Instruments and controls including Local Environmental Plans (LEPs), Development Control Plans (DCPS) and Development Contribution Plans; planning initiatives, such as e-planning and design excellence, and staff allocation for strategic and statutory planning functions.

Environmental Planning Instruments and Controls

In 2006, the State Government initiated the Standard Instrument LEP program to create a common format and content for all LEPs prepared by Councils. The program was intended to simplify the plan making system in NSW. The ultimate aim of the program is to have one LEP for each LGA, using a standard suite of land use zones and definitions and one comprehensive DCP.

In response to the Standard Instrument LEP program, Randwick City Council prepared a draft comprehensive LEP for public exhibition in late 2011. Preparation of the draft comprehensive LEP was informed by a series of 6 land use discussion papers relating to Industrial Lands, Special Uses, Open Space and Environment, Education and Health Specialised Centre Precinct, Business Centres and Residential Uses. The discussion papers presented an overview of each land use zone including the relevant issues and suggested options to address the identified challenges. These were exhibited for community comment throughout 2010 and 2011. The discussion papers provided an additional, non-statutory consultative process prior to the statutory exhibition process of the draft comprehensive LEP. Local Government NSW highly regarded Randwick's approach as being *"educative, sustained and interactive enabling residents to follow the strategy and engage in an informed manner."*^{cxxvii}

The matrix in the appendix provides a summary (under Planning Systems) of the status of LEP, DCP and Developer Contributions Plans as adopted by councils in the study group. All of the councils in the study group have prepared a new LEP based on the standard instrument and a comprehensive DCP. Woollahra's new LEP while still in draft form is to commence in May 2015 (the draft Woollahra comprehensive DCP was placed on public exhibition from late 2014 to early 2015). With regards to development contributions, all councils in the study group have a Section 94A¹⁹(s94A) development contributions plan in place. While Waverley Council has the one s94A Plan applying to the whole LGA, the City of Sydney has three development contributions plans for the LGA.

Design Excellence

Design Review Panel

Randwick City Council places great importance in promoting design excellence across the City. The emphasis on good urban design and place making culminated in the establishment of the Randwick-Waverley Design Review Panel in 2002, a joint partnership between Randwick City and Waverley Councils. The design review panel's key objective is to provide advice and guidance in the design of

¹⁹ Section 94A development contributions plan in place, which provides a flat rate levy on the total cost of development

residential flat and major developments. Inputs from the Panel have also been regularly sought as part of the preparation of Council's strategic plans and development controls.

Randwick City Council is currently formulating plans to transform the Design Review Panel to a 'Design Excellence Panel', in order to obtain expert design advice for a range of planning and development matters including:

- Residential Flat Buildings as defined under SEPP 65.
- Other residential buildings (including boarding houses, student accommodation and serviced apartments), mixed use developments, commercial and retail buildings, and institutional buildings.
- Development the subject of any LEP and DCP.
- Site specific DCPs and master plans for large and major sites.
- Other matters deemed suitable by Council's Directors and Managers.

It is Council's plan to continue our partnership with Waverley Council. Randwick and Waverley councils are the only pair of councils within the study group to have a joint partnership panel.

Architecture and Design Awards

The Randwick Urban Design Awards were established in 2004 to recognise and reward high quality development projects and to raise community awareness about the importance of good designs in the built environment. The Awards are a biennial program and are structured in the following categories:

- Single Dwelling House
- Multi Unit Housing
- Commercial / Mixed Use Development
- Heritage
- Sustainability
- Public Buildings

The next awards program is to be held in July 2015. Similar to Randwick City Council, Waverley Council also hosts architecture and design awards for their local community.

Architecture and Design Talks

Since 2013, Randwick City Council has been working in partnership with the Australian Institute of Architects in organising open seminars relating to architecture, landscape architecture and urban design issues in the Randwick LGA. The talks aim to promote good designs and community awareness. They also provide a channel for more in-depth discussion of those award-winning projects under the Randwick Urban Design Awards. Waverley, Woollahra and the City of Sydney also host architecture and design talks in their respective council areas.

Design Ideas for Rejuvenating Residential Flat Buildings:

The *Design Ideas for Rejuvenating Residential Flat Buildings* guideline was published by Randwick City Council in 2006. It showcases a number of refurbishment concepts using real flat buildings in the

Randwick LGA. It aims to encourage refurbishment proposals that improve the liveability of the units to meet current lifestyle needs; the environmental performance and sustainability of the building; and the appearance of buildings within the streetscape. The publication is another important initiative in promoting design excellence due to the relatively large number of older flat buildings in the City.

Design Excellence Provision in Local Environmental Plan

A 'Design Excellence' clause was included in the Randwick Local Environmental Plan 2012, which has been prepared in accordance with the Standard LEP template. The clause applies to developments involving the construction of a new building or external alterations on major / significant sites, or developments having a height of at least 15m. This clause provides a statutory basis for the assessment of development applications having regard to design excellence. The City of Sydney Council has a Competitive Design Policy and specific controls in the LEP that allow the granting of bonus height or floor space of up to 10%, subject to the carrying out of a design competition. This policy applies to major development proposals having a height of 25m (outside Central Sydney) to 55m (within Central Sydney), or having a capital value of more than \$100,000,000.

E-Planning

In recent years, the State Government has taken a strong initiative in promoting the use of information technology to present and disseminate planning information, to assist in planning and development decisions, and to streamline business processes and procedures, such as the Electronic Housing Code (EHC). The EHC is an online system that allows users to determine whether certain proposed works fall under Exempt or Complying Development and allows the lodgement of Complying Development Certificate applications. Randwick City, Botany Bay and Waverley Councils are live on the EHC online system.

At the Local Government level, Councils have increasingly utilised electronic systems to provide planning and development information to the general public and to undertake business transactions. Randwick is at the forefront of this movement and has committed to improved efficiency in the provision of planning information and engagement with the community. The range of e-planning tools which have already been made available or are in the advanced stage of preparation in Randwick are summarised below:

- On-line tracking of the progress of development applications received was introduced in 2008. The system also allows the downloading of documents submitted as part of the development applications.
- Electronic lodgement of development applications was introduced in 2012.
- Electronic Housing Code was launched in 2013.
- Conversion of paper-based planning controls to online interactive, summary form via the ICON program is presently at the advanced stage of preparation, with detailed testing of the system scheduled to commence within the next two months.
- 3-D computer modelling of significant precincts of Council has recently commenced; and
- Electronic lodgement of Section 149 Planning Certificates to be investigated

A comparison of e-planning initiatives across the other Councils is provided in the matrix under 'Planning Systems'. Note Randwick is the only Council within the group which has commenced the processing of electronic development applications

	Randwick	Botany Bay	Waverley	Woollahra	Sydney City
On-line DA tracking	Yes (launched 2008)	Yes	Yes	Yes	Yes
Conversion of planning controls to interactive, online form (e.g. ICON)	Advanced stage of preparation	N/A	N/A (Under preparation)	N/A	N/A
3-D modelling of built form	Commenced	N/A	Yes (On-going development)	N/A	Yes (Internal use only)
Electronic Housing Code	Yes (launched 2013)	Yes	Yes	N/A	N/A
Electronic lodgement of DA	Yes (launched 2012)	N/A	N/A	N/A	N/A
Electronic application and generation of S149 Certificates	To be investigated	N/A	Yes	N/A	Yes

Heritage Conservation

Randwick City's heritage is rich and diverse and includes buildings, structures, Aboriginal and archaeological sites, parks and reserves. They are associated with phases of history or important people and events. Collectively, this heritage contributes to the community's cultural life, sense of place and identity.

The following table provides a comparison with the number of heritage listing of other Councils in the group. The City of Sydney contains the highest proportion of heritage items and areas, followed by Woollahra, Randwick City, Waverley and then Botany Bay Council.

	Randwick	Botany	Waverley	Woollahra	Sydney City
No. of State Heritage Items	29	4	14	29	423
No. of Local Heritage Items	557	212	478	761	3197
No. of Heritage Conservation Areas	20	2	70 (including 53 Landscape Conservation Areas)	15	73

Planning staff allocation and caseload management

For the financial year 2013-14, Randwick had the highest number (799) of development applications determined when compared to Botany, Waverley and Woollahra. The number of assessment officers allocated for statutory planning function in Randwick is comparable to Botany and Waverley Councils. The City of Sydney had the highest number of development applications determined (1822) and also the highest number strategic and assessment planners. The total value of applications determined in the City of Sydney was significantly more than the total of applications determined for the remaining councils together. The following provides an overview of the caseload and staff numbers for the group of Councils.

	Randwick	Botany	Waverley	Woollahra	Sydney City
No. of Development Applications (DAs) Determined for 2013/14	799	135	528	557	1822
Estimated Construction Value (\$m) for 2013/14	\$300.53m	\$613.26m	\$397.46m	\$243.87m	\$3611.49m

Source: Local Development Performance Monitoring – Department of Planning and Environment

	Randwick	Botany	Waverley	Woollahra	Sydney City
Strategic Planners*	8	6	5	4	41
Assessment Planners**	13	11	13	24	61
Heritage Officers	1	N/A	1	3	4

*Excluding GIS, property and heritage officers, but include urban designers.

**Excluding environmental health officers.

Key commonalities and / or findings for Planning Systems

- All councils in the study group have prepared a new LEP based on the Standard Instrument template and a comprehensive DCP.
- All councils have a Section 94A development contributions plan in place; some have additional contributions plans applying to specific areas.
- Randwick is highly progressive in promoting good urban design and place making amongst the study group, culminating in the establishment of the Randwick-Waverley Design Review Panel, Randwick City Urban Design Awards and Randwick Architecture Talks programs.
- Randwick is at the forefront of utilising e-planning systems featuring on-line tracking and lodgement of development applications and the Electronic Housing Code (EHC).
- Randwick is the only Council within the group which has started the processing of electronic DAs.
- The City of Sydney contains the highest proportion of heritage items and areas, followed by Woollahra, Randwick City, Waverley and Botany Bay Councils.
- For the financial year 2013-14, Randwick had the highest number (799) of development applications determined when compared to Botany, Waverley and Woollahra. The number of assessment officers allocated for statutory function in Randwick is comparable to Botany and Waverley Councils.
- The City of Sydney had the highest number of development applications determined (1822) and also the highest number of strategic and assessment planners.

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2.4 STRATEGIC PLANNING AND CAPACITY –MERGER OPTIONS ANALYSIS

The following table attempts to assess the advantages and/ or disadvantages with each merger option across the four key planning themes ('Economic activity and Employment areas', 'Transport and Access', 'Housing and Liveability' and 'Parks and Recreation') and against three key criteria:

1. The first criterion is '**Observations**' – which picks out key commonalities and/or linkages for each merger option across the four key planning themes.
2. The second criterion is '**Subregional Strategic Implications****' – which aims to assess how each merger option will meet key state and local planning policy priorities.
3. The third criterion is '**Planning Systems**' – which looks at the compatibility of planning systems such as planning frameworks and e-planning for each merger option.

1. Observations

This section looks at key commonalities or differences in the characteristics of each LGA. The broad implications for the seven amalgamation options are:-

- Where there are significant common characteristics between councils, amalgamation in practical terms is potentially smoother, assuming there is already a common community understanding of strategic issues, less potential for competing priorities, and easily transferable staff skills.
- Conversely, where there are significant differences or contrasting characteristics between councils, amalgamation, while more complex to implement, may have potential to improve overall strategic capacity and strengthen the council's ability to deal with a wider range of strategic challenges.

2. Subregional Strategic Implications

This section looks at the key strategic priorities in state, metropolitan and regional plans that impact the five councils, and identifies possible advantages, disadvantages or neutrality of the various amalgamation options.

- Advantages occur when there is improved potential for a coordinated approach to achieving subregional outcomes. This provides potential for a council to be a stronger voice at the table.
- Conversely, disadvantages occur when key actions that cross local government boundaries can tend to dilute local government influence.

3. Planning Systems

This section looks at key aspects, commonalities and differences between each council's planning systems. Similarities in systems, capabilities and approaches will allow a more streamlined amalgamation process.

**The key subregional strategic planning policy implications as identified in the second chapter of the report (under the state and local planning policy framework) relevant to the study area are:

- Economic growth to be concentrated in the economic nodes of global Sydney, the global economic corridor, southern Sydney employment lands, strategic centres, and transport gateways of Port Botany and Sydney Airport.
- Future housing growth to be focused in strategic centres, government (surplus) land, transport corridors and areas identified for urban renewal.
- Increase housing choice around centres through urban renewal in established areas
- Increase the percentage of the population living within 30 minutes by public transport of a city or major centre
- Connecting centres with a networked transport system
- Focus to strengthen western Sydney and make Parramatta, Sydney's second CBD
- Improve access to recreational opportunities and linkages between regional open spaces to form a green space network
- Recommendation to amalgamate Botany Bay, Randwick, Sydney, Waverley and Woollahra councils to form a single council area

Note an analysis has been completed based on information publicly available regarding the councils, and this analysis could be refined with more detailed information and discussion with the subject councils.

MERGER OPTIONS ANALYSIS – SUMMARY OF ALIGNMENTS AND DIFFERENCES, ADVANTAGES AND CHALLENGES

	OPTION 1	OPTION 2	OPTION 3	OPTION 4	OPTION 5	OPTION 6	OPTION 7
	RCC	RCC/BB	RCC/WAV	RCC/WAV/ BB	RCC/WAV/ WOO	RCC/WAV/ WOO/BB	RCC/WAV/ WOO/BB/COS
OBSERVATIONS							
Centres and Economy	B	B	B	B	B	B	D
Transport	B	B	B	B	B	B	A
Housing and liveability	A	D	B	D	C	D	E
Open space and recreation	A	B	B	B	B	B	A
STRATEGIC DIRECTIONS							
Regional/subregional boundaries	C	B	B	B	B	A	E
Housing and liveability	C	C	B	D	C	B	B
Employment and Centres	B	B	B	B	B	B	D
Transport and access	C	B	B	B	B	B	A
Open space and recreation	B	C	A	B	A	B	A
PLANNING SYSTEMS							
Planning instruments and controls	B	D	C	D	D	E	E
Design excellence	A	E	A	D	B	D	D
Planning staff management	B	C	C	C	D	D	E
E-planning systems	A	D	A	D	D	D	D

Key

- A. Significant alignment/advantage
- B. Minor alignment/advantage
- C. Neutral
- D. Minor difference/challenge
- E. Significant difference/challenge

This table is a summary of the key matters identified in the following detailed table.

TABLE OF MERGER OPTIONS – DETAILED ANALYSIS

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
Observations							
<i>Centres, Economy & Employment</i>	<ul style="list-style-type: none"> • Randwick Education and Health Strategic Centre • Ports Precinct and industrial surrounds are split across Randwick and Botany Councils 	<ul style="list-style-type: none"> • Two strategic centres • Port Botany joined • High employment containment • Competing smaller centres 	<ul style="list-style-type: none"> • Two key strategic centres (Randwick Education and Health precinct and Bondi Junction) that are complementary • High employment containment • Similar smaller centres hierarchy 	<ul style="list-style-type: none"> • Two key strategic centres (Randwick Education and Health Precinct and Bondi Junction) and Port Botany Precinct • High employment containment • Competing smaller centres 	<ul style="list-style-type: none"> • Two key strategic centres (Randwick Education and Health precinct and Bondi Junction) that are complementary • Similar smaller centres hierarchy 	<ul style="list-style-type: none"> • Two key strategic centres (Randwick Education and Health Precinct and Bondi Junction) and Port Botany Precinct • High employment containment • Diverse economic specialisations 	<ul style="list-style-type: none"> • Four key strategic centres (Sydney CBD, Randwick Education and Health precinct, Bondi Junction, Green Square) and Port Botany Precinct • High employment containment within the region • Diverse economic specialisations

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
<i>Transport</i>	<ul style="list-style-type: none"> • High accessibility within the LGA. • Randwick Education and Health centre has the highest proportion of people walking to work 	<ul style="list-style-type: none"> • Similar transport/travel characteristics of residents 	<ul style="list-style-type: none"> • Similar transport/travel characteristics of residents 	<ul style="list-style-type: none"> • Similar transport/travel characteristics of residents 	<ul style="list-style-type: none"> • Similar transport/travel characteristics of residents 	<ul style="list-style-type: none"> • Similar transport/travel characteristics of residents 	<ul style="list-style-type: none"> • Similar transport/travel characteristics of residents • Contrasting travel demands, access and congestion issues to CBD compared to other areas

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
<i>Housing and Liveability</i>	<ul style="list-style-type: none"> Majority of new housing growth is in multi-unit housing form 	<ul style="list-style-type: none"> Southern suburbs of Randwick City and Botany Bay share features ie: single dwellings & social housing stock Botany Bay housing growth is significantly higher than Randwick and is mainly focussed on brownfield sites and renewal areas. 	<ul style="list-style-type: none"> Northern suburbs of Randwick and Waverley share common features ie. medium to higher density housing Similar housing growth patterns – eg: infill, densification around centres/ corridors Common affordable housing issues 	<ul style="list-style-type: none"> Botany Bay housing growth patterns unlike RCC/Waverley (ie: brownfield/surplus industrial land compared with infill and centre development) 	<ul style="list-style-type: none"> Similar growth patterns/ potential – eg: infill, densification around centres/ corridors Common affordable housing issues 	<ul style="list-style-type: none"> Botany Bay housing growth patterns unlike RCC/Waverley/ Woollahra (ie: brownfield/surplus industrial land compared with infill and centre development) 	<ul style="list-style-type: none"> City of Sydney and Botany Bay Councils have several large areas undergoing renewal and are leading councils in terms of housing supply Three of the five councils have affordable housing strategies Different housing growth patterns. In City of Sydney and Botany Bay housing growth is focused on

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
							brownfield sites and urban renewal areas.

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
<i>Parks and recreation</i>	<ul style="list-style-type: none"> • Randwick has a significant provision of open space and recreational facilities and a large share of the open space attracts visitors beyond the LGA or across the whole Sydney. • Randwick provides more than 50% of the open space 	<ul style="list-style-type: none"> • A large proportion of both LGAs are designated for open space and conservation purposes, mostly with regional significance. Subject to future extensions, the Coastal Walkway will extend and connect both LGAs 	<ul style="list-style-type: none"> • Both contain key recreational destinations and attractions that generate a large amount of cross-border overflow. • Similar foreshore open space typology and usage: beaches, foreshore reserves etc. • Share common issues/ challenges in terms of land and water interface. • Coastal 	<ul style="list-style-type: none"> • Similar open space typology and usage, except Botany, whose land-water interface is heavily associated with industrial uses. • Subject to future extensions, the Coastal Walkway will extend and connect the foreshore area of the three councils. 	<ul style="list-style-type: none"> • All contain key recreational destinations and attractions that generate a large amount of cross-border overflow. • Similar foreshore open space typology and usage: beaches, foreshore reserves etc. • Share common issues/ challenges in terms of land and water interface. • Coastal 	<ul style="list-style-type: none"> • Similar open space typology and usage, except Botany, whose land-water interface is heavily associated with industrial uses. • Subject to future extensions, the Coastal Walkway will extend and connect the foreshore area of the four councils 	<ul style="list-style-type: none"> • The boundaries of the Centennial Parklands are across or adjacent to the four LGAs of the City of Sydney, Randwick City, Waverley & Woollahra • A large proportion of the foreshore area in City of Sydney, Woollahra and Randwick are out of local councils' jurisdiction and subject to Federal and

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
	assets in the study area.		Walkway which extends along the foreshore of the two LGAs.		Walkway which extends along the foreshore of the three LGAs. • Similar council initiatives in creating and enhancing green links.		State control.
Sub-regional strategic implications							
<i>Regional and subregional boundaries/ global city concept</i>		<ul style="list-style-type: none"> • Integration of Port Botany and surrounds • Both councils in part of Global economic corridor 	<ul style="list-style-type: none"> • The strategic centres of Bondi Junction and the Randwick Education and Health precinct adjoin and form part of the southern portion of the 	<ul style="list-style-type: none"> • Randwick, Waverley and Botany Bay have historically been grouped under the draft east subregional strategy. 	<ul style="list-style-type: none"> • The councils have historically been grouped in subregional plans ie. 'draft east subregional strategy' 	<ul style="list-style-type: none"> • The councils previously comprised the eastern subregion in the 'draft East Subregional Strategy' 	<ul style="list-style-type: none"> • Meets the ILGRP recommendation for a Global Sydney. However, is inconsistent with the global city concept in state strategic

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
			global economic corridor.				<p>planning documents as outlined in the Global City concept of this report.</p> <ul style="list-style-type: none"> • Coordinated planning of key economic generators along the Global Economic Corridor, including the CBD, Port Botany, Randwick Health and Education Specialised Centre, Green Square and

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
							<p>Southern Sydney employment lands.</p> <ul style="list-style-type: none"> • Links major visitor attractions and events precinct (SCG to Royal Randwick Racecourse)
<p><i>Housing & Liveability</i></p> <ul style="list-style-type: none"> - Increasing housing choice - Providing homes closer to jobs 	<ul style="list-style-type: none"> • Focus growth (housing and jobs) in and around town centres, the Randwick Education and Health Strategic Centre and 	<ul style="list-style-type: none"> • Significant housing growth in Botany Bay on brownfield sites contributes to housing choice and supply for the area • Housing growth focussed in and 	<ul style="list-style-type: none"> • Housing growth focussed in and around strategic centres (Randwick Education and Health strategic centre, Bondi Junction town centre), centres and transport 	<ul style="list-style-type: none"> • Significant housing growth in Botany Bay on brownfield sites contributes to housing choice and supply for the area. • Housing growth focussed in and 	<ul style="list-style-type: none"> • Housing growth focussed in and around strategic centres (Randwick Education and Health strategic centre, Bondi Junction town centre), centres and transport 	<ul style="list-style-type: none"> • Significant housing growth in Botany Bay on brownfield sites contributes to housing choice and supply for the area • Housing growth focussed in and 	<ul style="list-style-type: none"> • The significant renewal projects underway in the City of Sydney and Botany Bay Council areas contributes to housing choice and supply close to key

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
	transport corridors	around strategic centres (Randwick Education and Health strategic centre), centres and transport corridors provides homes closer to jobs	corridors provides homes closer to jobs <ul style="list-style-type: none">Joint affordable housing strategies facilitate the supply of affordable housing and housing choice for the community	around strategic centres (Randwick Education and Health strategic centre, Bondi Junction town centre), centres and transport corridors (Kings Cross to Bondi Junction rail line) provides homes closer to jobs	corridors (Kings Cross to Bondi Junction rail line) provides homes closer to jobs	around strategic centres (Randwick Education and Health strategic centre), centres and transport corridors provides homes closer to jobs	employment areas. <ul style="list-style-type: none">The region provides for 4 strategic centres, transport corridors and large renewal areas to focus housing growth close to key employment areas.
<i>Strategic centres, gateways and corridors -Strengthening economic development</i>	<ul style="list-style-type: none">Precinct planning for the future growth of Randwick Education	<ul style="list-style-type: none">Coordinated planning for the transport gateway of Port Botany and the surrounding industrial areas	<ul style="list-style-type: none">Coordinated planning for the strategic centres of Bondi Junction and Randwick Health and	<ul style="list-style-type: none">Coordinated planning for the strategic centres of Bondi Junction and Randwick Health and	<ul style="list-style-type: none">Coordinated planning for the strategic centres of Bondi Junction and Randwick Health and	<ul style="list-style-type: none">Coordinated planning for Port Botany and surrounding industrial areas, the	<ul style="list-style-type: none">Coordinated planning for the transport gateway of Port Botany, 4 strategic centres,

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
<i>in strategic centres, employment corridors and transport gateways</i>	and Health Strategic Planning		Education Specialised Centre	Education Specialised Centre and Port Botany and the surrounding industrial areas	Education Specialised Centre <ul style="list-style-type: none"> Coordinated planning for smaller centres/strips in the area eg. Woollahra, Paddington, Double Bay 	strategic centres of Bondi Junction and Randwick Health and Education Specialised Centre	southern employment lands with Airport. However, the Airport Precinct is still not integrated into the one council area. <ul style="list-style-type: none"> Integrated retail centre planning of Sydney CBD, Bondi Junction, other retail centres (Eastgardens, Maroubra Junction) and villages such as Woollahra, Double Bay

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
Transport and access - Connecting centres with a networked transport system	<ul style="list-style-type: none"> • Light rail route connects key centres in Randwick City. Potential extension to other centres in south 	<ul style="list-style-type: none"> • Potential for coordinated east-west public transport planning of strategic bus routes • Potential to extend & connect light rail networks to other centres, including Eastgardens • Improved coordination of new cycle links between centres 	<ul style="list-style-type: none"> • Links key travel demand corridor between Randwick and Bondi Junction • Potential to extend & connect light rail networks to the strategic centres 	<ul style="list-style-type: none"> • Potential to extend & connect light rail networks between centres (eg: Bondi Junction to Mascot via Eastgardens) • Links key travel demand corridor between Airport, Randwick and Bondi Junction 	<ul style="list-style-type: none"> • Links travel demand corridors along Oxford street (part) and New South Head Road • Beach runner bus to connect key tourist locations along the coast • Improved coordination of new cycle links between centres 	<ul style="list-style-type: none"> • Improved coordination of new cycle links between centres 	<ul style="list-style-type: none"> • Links key travel demand corridors and cycle ways between CBD and eastern suburbs • Strategic benefits that light rail may bring in terms of accessibility within a single region and the potential for the route to be extended to connect other key areas in the region

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
<p><i>Open Space and Environment</i></p> <p>- Improve access to recreational opportunities and linkages between regional open spaces to form a green space network</p>	<ul style="list-style-type: none"> • Randwick has a rich and diverse range of regionally significant open space assets scattered across the LGA. 	<ul style="list-style-type: none"> • Potential for coordinated planning and delivery of green links connecting key open space and recreational facilities in the two council areas. 	<ul style="list-style-type: none"> • Potential for continuous green links both north-south and east-west across the City • Experience of Waverley Council's Green Links Project can be better applied to Randwick, to achieve improved connectivity of its open space network. 	<ul style="list-style-type: none"> • Potential for continuous green links both north-south and east-west across the study area 	<ul style="list-style-type: none"> • Coordination of open space and recreation planning and management across all eastern beaches and harbour beaches • Potential for coordinated planning and delivery of green links connecting key open space and recreational facilities in the three council areas. 	<ul style="list-style-type: none"> • Potential for better integration of open space assets in Randwick and Botany Bay into the existing open space network (mostly established and extended across City of Sydney, Woollahra and Waverley). 	<ul style="list-style-type: none"> • Potential to coordinate and extend linkages and corridors such as the Eastern Coastal Walkway, Harbourside Walk, Federation Track and a large number of green links that connect the main routes/ corridors together to form an interconnected network of open spaces. •
Planning systems							

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
<i>Environmental Planning Instruments and Controls</i>	<ul style="list-style-type: none"> A high degree of autonomy for local planning could be maintained. 	<ul style="list-style-type: none"> Both Botany and Randwick have a comprehensive LEP and DCP. Integration of the planning controls between the two councils would likely be a relatively smooth transition process. 	<ul style="list-style-type: none"> The LEP and comprehensive DCP of both Waverley and Randwick are recently adopted. Integration of the planning controls between the two councils would likely to manifest in a relatively smooth transition process. 	<ul style="list-style-type: none"> All three councils have a comprehensive LEP and DCP that are recently adopted. Any integration of the planning controls would likely to manifest in a relatively smooth transition process. 	<ul style="list-style-type: none"> Woollahra's comprehensive LEP and DCP is still in draft form however commencement is imminent. Woollahra also employs a different mechanism for regulating low density residential developments that varies from other councils. Integration of the planning controls across the three councils is anticipated to involve more 	<ul style="list-style-type: none"> All other councils apart from Woollahra have a comprehensive LEP and DCP in place. Despite the fact that the majority of Councils have a comprehensive LEP and DCP in place, the variety of land use zones and planning controls across the area is anticipated to involve more time and 	<ul style="list-style-type: none"> There would be complications in integrating the different planning instruments and controls across all five councils. However, from a user's perspective, the rationalisation of planning controls would improve clarity and reduce complexity in the whole planning

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
					time and resources.	resources than other scenarios.	system applicable to the sub-region.
<i>Design Excellence</i>	<ul style="list-style-type: none"> Randwick is progressive in promoting design excellence across the City. Where Randwick remains independent, high quality design outcomes could still be expected. 	<ul style="list-style-type: none"> Reconstitution of the Design Review Panel would be necessary. 	<ul style="list-style-type: none"> The two councils have high compatibility as both have been sharing the same Design Review Panel for over a decade and have similar initiatives in promoting design excellence. 	<ul style="list-style-type: none"> Reconstitution of the Design Review Panel would be necessary. 	<ul style="list-style-type: none"> The constitution and jurisdiction of a new Design Review Panel would need to be determined. 	<ul style="list-style-type: none"> The constitution and jurisdiction of a new Design Review Panel would need to be determined. 	<ul style="list-style-type: none"> The constitution, function and jurisdiction of a new Design Review Panel or equivalent would need to be determined.

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
<i>Planning Staff Management</i>	<ul style="list-style-type: none"> • Randwick has high performing planning staff. Where Randwick remains independent, a good level of operational efficiency could still be maintained. 	<ul style="list-style-type: none"> • Potential benefits may include: <ul style="list-style-type: none"> - Sharing and pooling of expertise - Job rotation - Balancing work load through internal staff transfer 	<ul style="list-style-type: none"> • Potential benefits may include: <ul style="list-style-type: none"> - Sharing and pooling of expertise - Job rotation - Balancing work load through internal staff transfer 	<ul style="list-style-type: none"> • Potential benefits may include: <ul style="list-style-type: none"> - Sharing and pooling of expertise - Job rotation - Balancing work load through internal staff transfer 	<ul style="list-style-type: none"> • Potential benefits may include: <ul style="list-style-type: none"> - Sharing and pooling of expertise - Job rotation - Balancing work load through internal staff transfer 	<ul style="list-style-type: none"> • Potential benefits may include: <ul style="list-style-type: none"> - Sharing and pooling of expertise - Job rotation - Balancing work load through internal staff transfer • Major organisational restructuring across all four Councils would be needed. 	<ul style="list-style-type: none"> • Potential benefits may include: <ul style="list-style-type: none"> - Sharing and pooling of expertise - Job rotation - Balancing work load through internal staff transfer • Major organisational restructuring across all five Councils would be needed.

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
<i>E-Planning</i>	<ul style="list-style-type: none"> • More autonomy and flexibility in choosing the most appropriate systems or packages available when Randwick remains independent. • However, financing for future system upgrades and 	<ul style="list-style-type: none"> • A degree of resource sharing maybe achievable for financing future upgrades to the planning information and business transaction systems. • However, Botany is still at a preliminary stage of implementing their e-planning tools. There is a need to reinforce 	<ul style="list-style-type: none"> • Compatibility between the two councils is high as the planning information and business transaction systems of both organisations are generally at par with each other. 	<ul style="list-style-type: none"> • A degree of resource sharing maybe achievable for financing future upgrades to the planning information and business transaction systems. • The key challenge would be the upgrading of the e-planning system in Botany to match those of Waverley and 	<ul style="list-style-type: none"> • A degree of resource sharing maybe achievable for financing future upgrades to the planning information and business transaction systems. • The key challenge would be the upgrading of the e-planning system in Woollahra to match those of Waverley and Randwick. 	<ul style="list-style-type: none"> • A degree of resource sharing and economies of scale maybe achievable for financing future upgrades to the planning information and business transaction systems. • A higher degree of coordination would be required to reconcile the differences in the property and planning information 	<ul style="list-style-type: none"> • A degree of resource sharing and economies of scale maybe achievable for financing future upgrades to the planning information and business transaction systems. • A high degree of coordination would be required to reconcile the differences in the property and planning information

Merger Options	1. Randwick	2. Randwick/ Botany	3. Randwick/ Waverley	4. Randwick/ Waverley/ Botany Bay	5. Randwick/ Waverley/ Woollahra	6. Randwick/ Waverley/ Botany Bay/ Woollahra	7. 'Global City' City of Sydney, Randwick, Waverley, Woollahra, Botany
	improvement would be born entirely by Randwick alone.	systems upgrade to the Botany area.		Randwick.		<p>systems across the four councils.</p> <ul style="list-style-type: none"> The key challenge would be the upgrading of the e-planning systems in Botany and Woollahra to match those of Waverley and Randwick. 	<p>systems across all five councils.</p> <ul style="list-style-type: none"> The key challenge would be the upgrading of the e-planning systems in Botany and Woollahra to match the other Councils.

APPENDIX

- **Matrix of key planning themes and characteristics for each council area**
- **Comparison of Planning approach to the Natural and Built Environment and future growth**

Note an analysis has been completed based on information publicly available regarding the councils, and this analysis could be refined with more detailed information and discussion with the subject councils.

Key Planning themes/ characteristics for each council area

Planning themes	Randwick	Botany Bay	Waverley	Woollahra	City of Sydney
Economic Activity and Employment Areas					
Employment generators	Randwick Education and Health Specialised Centre; Royal Randwick Racecourse; Port Botany and surrounding light industry	Ports Precinct; Industrial & commercial activities	Bondi Junction Specialised Centre (Education, financial & Insurance services, retail) Tourist and Visitor Destination (Bondi)	Village centres/ associated health care, education and retail (Double Bay, Paddington, Woollahra)	Sydney CBD – financial & insurance services; Major retail & hospitality destination; Southern Sydney employment lands Tourist & Cultural destination
Economic profile Gross Regional Product(GRP ²⁰)/ Largest industry in terms of employment	\$7.77 billion/ Health Care and Social Assistance	\$9.5 billion/ Transport, Postal and Warehousing	\$4.04 billion/ Retail Trade	\$3.94 billion/ Education and Training	\$101.87 billion/ Financial and Insurance Services
Retail/commercial centres	Randwick Junction (Royal Randwick), Maroubra Junction (Pacific Square), Kensington, Kingsford, Coogee	Mascot Train Station, Eastgardens and surrounding light industry	Major retail: Bondi Junction Westfield, Eastgate shopping centre	Village centres (Double Bay, Paddington, Woollahra, Rose Bay)	Sydney CBD; Major Retail (Westfield, David Jones, Myer) and Mall shopping, Australian Technology Park, Village centres (Surry Hills, Paddington, Kings Cross/Potts Point)
Transport and Access					

²⁰ as of 30 June 2014. The Gross Regional Product of an area is the equivalent of Gross Domestic Product, but for a smaller area. It is the amount of the nation's wealth which is generated by businesses, organisations and individuals working in the area. Source: NEIR 2014 & <http://economy.id.com.au/>

Transport demand corridors	North-south demand corridors on Anzac Parade, and Randwick to Bondi Junction	North-south demand corridors on Botany Road/Southern Cross Drive/Eastern distributor	East-west demand corridor on Oxford Street	East-west demand corridor on Oxford Street	Destination of most major travel demand corridors in study area
Journey to work	72.1% residents work in RCC or study area	69.9% residents work in Botany Bay or study area	72.1% residents work in Waverley or study area	75.6% residents work in Woollahra or study area	68.3% residents work in CoS or study area
Public transport	CBD and SE light rail (in development) and future re-designed bus network	Airport Rail Line (Mascot Train Station)	Eastern Suburbs Rail Line Bondi Junction transit interchange	Ferry, Bus and Eastern Suburbs rail line	All metro rail lines, Train and Bus interchange, Light rail
Walking and cycling	Average 1.7 walking trips per day 14% people walk to work at Randwick education and Health Centre	Average 1.6 walking trips per day	Average 2.3 walking trips per day 9% people walk to work in Bondi Junction	Average 2.2 walking trips per day	Average 3.4 walking trips per day 6% people walk to work in Sydney CBD 60,000 average cycle trips per day Cycle commuting has increased 132% between 2010 and 2014
Housing and Liveability					
Housing (characteristics) % of dwellings that are medium or high density	70.2%	60.7%	80.7%	76.9%	94.7%
Residential activity (2013/14)					

Dwelling approvals <i>(includes the conversions and dwelling units approved as part of the alterations and additions or the construction of non-residential buildings)</i>	493 dwellings approved	2041 dwellings approved	670 dwellings approved	359 dwellings approved	2470 dwellings approved
Dwellings approved that are in multi-unit buildings	355 dwellings approved (72% of total dwellings approved)	2002 dwellings approved (98% of total dwellings approved)	592 dwellings approved (88% of total dwellings approved)	54 dwellings approved (15% of total dwellings approved)	2358 dwellings approved (95% of total dwellings approved)
Net dwelling completions <i>(the number of completed dwellings added to the existing stock, adjusted for demolitions. As an example, a two-unit development that demolished one house is counted as one additional dwelling)</i>	544 net dwellings completed	710 net dwellings completed	61 net dwellings completed	9 net dwellings completed	2578 net dwellings completed
Net dwellings completed that are in multi-unit buildings	534 net dwellings completed (98% of total net dwellings completed)	691 net dwellings completed (97% of total net dwellings completed)	59 net dwellings completed (97% of total net dwellings completed)	1 net dwelling completed (11% of total net dwellings completed)	2514 net dwellings completed (98% of total net dwellings completed)
Council Housing Services (Seniors Housing, Assisted Living; and /or affordable/ key worker housing)	Randwick Affordable Rental Housing Program and Policy Owns 20 units for key worker housing in		Waverley Affordable Housing Program for low to moderate income households across 28 units (various locations); Waverley Housing for		City of Sydney Affordable Rental Housing Strategy 2009-2014 --- Green Square area –

	various locations		<p>Older People – provides affordable housing to people > 65 years of age across a stock of 55 units;</p> <p>Waverley Community Living Program (WCLP) provides secure and affordable housing for people with a mild intellectually disability across a stock of 4 units</p>		<p>100 affordable rental units built (target of 330 units)</p> <p>Ultimo/Pymont area – 450 affordable rental units built (target of 600 units)</p> <p>Harold Park (target of 50 new affordable dwellings)</p> <p>Glebe Affordable Housing Project (target of 20 social housing units + 90 new affordable housing dwellings)</p>
Education Establishments	<p>TAFE UNSW</p> <p>National Institute of Dramatic Arts</p> <p>Private and Public primary and</p>	<p>Private and Public primary and secondary schools (1 High School (1 Public); 8 Primary Schools (7 Public))</p>	<p>Private and Public primary and secondary schools (4 High Schools (1 Public), 7 Primary Schools (5 Public))</p>	<p>Private and Public primary and secondary schools (4 High Schools (0 Public), 7 Primary Schools (6 public) and 2 mixed schools (from</p>	<p>University of Sydney, University of Technology Sydney, Tafe Ultimo, Private and Public primary and secondary schools (10</p>

	secondary schools (10 High schools (4 Public); 24 Primary Schools (11 Public); and 3 mixed schools (from K-12))		and 2 mixed schools (from K-12))	K-12))	High Schools (4 public), 7 Primary Schools (7 public), and 2 mixed schools (from K-12))
Health	Randwick Hospitals Campus: Prince of Wales, RHW Sydney Childrens Hospital & Surrounding health related services	Local health related services	War Memorial Hospital; Local health related services	Wolper Jewish Hospital, Local health related services	The Sydney Hospital, Eye Hospital; Royal Prince Alfred Hospital & surrounding health related services.
Parks and Recreation					
Natural features/environment	Nine beaches, Botany Bay National Park; Malabar Headland National Park	Botany Wetlands; the Botany Bay Foreshore beach (between the Port and Airport); Penrhyn Estuary Botany Wetlands Coastal	Beaches: Bondi, Bronte, Tamarama	Sydney Harbour Foreshore, South Head, Sydney Harbour National Park	Sydney Harbour, Federal Park Saltmarsh Wetland,
Key Open space corridors and linkages	Eastern Coastal walkway Federation Track Centennial Parklands	Coastal walkway (proposed) Botany Wetlands	Eastern Coastal walkway Federation Track Green Links Pedestrian Network Centennial Parklands	Eastern Coastal walkway Harbourside Walk Federation Track Centennial Parklands	Harbourside Walk Centennial Parklands
Parks & Recreation (Regional parks in bold)	Centennial Parklands, Randwick Racecourse, Heffron	Lakes Golf Course, Hensley Athletic Field, Sir Joseph	Diamond Bay Reserve, Eastern Reserve, Rodney	South head, Sydney Harbour National Park, Rose Bay Marina,	Alexandria Park, Sydney Park , Cook+ Philip Park, Glebe Foreshore Parks,

	<p>Park, New South Wales Golf Course; The Australian Golf Course, Randwick Golf Club, Cromwell Park, Kensington Park, Malabar Headland, Arthur Byrne Reserve, Jack Vanny Memorial Park, Randwick Cemetery, Latham Park, Burrows Park Randwick Environment Park, Pioneers Park, Randwick Golf Course, St Michaels Golf Course, The Coast Golf Course, Coogee Oval, Alison Park, High Cross, Barden Park, Baker Park, Bangor Park, Blenheim Park, Duningham Reserve, Grant Reserve, Bundock Park, Trennery Reserve, Snape Park, Neptune Park, Quarry Reserve, Nagle Reserve, Coral Sea Park, Broadarrow</p>	<p>Banks Park, John Curtin Reserve, Gaiairine Gardens, Mascot Memorial Park, Booralee Park Mascot Oval Astrolabe Park, David Phillips Field, Rowland Park, Bonnie Doon Golf Club, Jellicoe Park, Eastlakes Reserve, Eastlakes Golf Course, Mutch Park, L'Estrange Park, Booralee Park, Garnet Jackson Reserve, Botany Bay Golf Course</p>	<p>Reserve, Raleigh Reserve, Bondi Park, Marks Park, Bronte Park, Tamarama Park, Waverley Cemetery, Waverley Park Queens Park, Bondi Park, Bronte Park, Dudley Page Reserve, Rodney Reserve, Hugh Bamford Reserve, Hunter Park, Marks Park, Tamarama Park, Diamond Bay Reserve</p>	<p>White City Tennis Club, Royal Sydney Golf Course, Cooper Park, Rushcutters Bay Park, Weigall Sportsground, Yaranabbe Park, Trumper Park, Lyne Park, Wollahra Oval, Rose Bay Park, Tingira Memorial Park, Hermitage Reserve, Neilsen Park, Vaucluse Park, , Parsley Bay Reserve, Gap Park, Robertson Park, Sydney Harbour National Park, Christison Park, Signall Hill Reserve, LightHouse Reserve</p>	<p>Hyde Park, Observatory Hill Park, Paddington Reservoir Gardens, Pirrama Park, Prince Alfred Park, Redfern Park, Royal Botanic Gardens and The Domain, Sydney Park, Moore Park Golf Course, Moore Park, Sydney Cricket Ground, Tumbalong Park, Victoria Park, Wentworth Park, Hyde Park, Belmore Park, The Domain, Royal Botanic Gardens, Wentworth Park, Tumbalong Park, Pirrama Park</p>
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	Reserve, Cromwell Reserve, Barwon Park, Chifley Sports Field, Frechmen's Bay Reserve, Yarra Bay Reserve, Bicentennial Park, Botany Cemetery , Cann Park, Bob Aday Park, Woomera Reserve, McCartney Oval, Botany Bay National Park				
Cultural & Visitor attractions	National Institute of Dramatic Arts; Randwick Racecourse; The Spot; Beaches; Bondi to Coogee Coast Walk	Botany Aquatic Centre; Botany Bay National Park – Captain Cooks Landing Site	Bondi Beach, Tamarama Beach, Bronte Beach; Bondi to Coogee Coast Walk; Bondi Markets	Watsons Bay, South Head, Sydney Harbour National Park,	Sydney Opera House; Sydney Harbour Bridge; Darling Harbour; Walsh Bay; Entertainment Quarter at Moore Park; Art Gallery of NSW; Museum of Contemporary Art; Museum of Sydney; Powerhouse Museum; Chinatown & Haymarket; The Rocks
Planning Systems					
Planning framework Local Environmental Plan	Randwick LEP 2012 (commenced 15 Feb 2013)	Botany Bay LEP 2013 (commenced 21 June 2013)	Waverley LEP 2012 (commenced 26 October 2012)	Woollahra LEP 1995 Woollahra LEP 2014 (based on standard template) approved and to commence on	Sydney LEP 2012 (commenced 14 December 2012) Sydney LEP 2005 (applies only to Carlton

				23 May 2015	United Brewery Site --- Central Sydney Planning Committee & Council as consent authorities
Development Control Plans	Randwick DCP 2013	Botany Bay DCP 2013	Waverley DCP 2012	27 x individual DCPs Draft Woollahra DCP (intended to commence on 23 May 2015)	Sydney DCP 2012
Development contributions Section 94 (s94) or Section 94A (s94A)	S94A Development Contributions Plan (effective 17 July 2012) Section 94 Development Contributions Plan 2000 (Bundock Street) (applies to the Department of Defence Site at Bundock Street)	S94 Mascot Station Precinct Plan (effective 21 January 2015) S94 Contributions Plan 2005-2010 (effective 10 January 2006)	S94A Developer Contributions Plan 2006 (amended on 14 November 2014)	S94 Development Contributions Plan (adopted June 2008) S94A Development contributions plan (effective 31 August 2011)	City of Sydney S94 Contributions Plan (updated June 2009) Ultimo Pyrmont S94 Contributions Plan 1994 (amended in January 2012) Central Sydney S94 Development Contributions Plan (under section 61 of the <i>City of Sydney Act 1988</i>) (adopted July 2013)
No. of Heritage Items (Local & State) & Heritage Conservation Areas	29 State Heritage Items 557 Local Heritage items	4 State Heritage items 212 Local Heritage items	478 Local Heritage Items 14 State Heritage items	761 Local Heritage Items 29 State Heritage Items 15 Conservation Areas	3197 Local Heritage Items 423 State Heritage Items

	20 Heritage conservation areas	2 Heritage Conservation areas	70 (including 53 landscape conservation areas) conservation areas		73 Heritage Conservation Areas
No. of Development Applications (DAs) Determined (approved or refused) & estimated construction value (\$ m) for 2013/14²¹	799 DAs \$300.53m	135 DAs \$613.26m	528 DAs \$397.46m	557 DAs \$243.87m	1822 DAs \$3611.49m
No. of Assessment Planners* * Excluding environmental health officers	13	11	13	24	61
E-Planning	Electronic Housing Code (EHC); Lodge DAs electronically; DA tracking	Electronic Housing Code (EHC); - DA tracking	Electronic Housing Code (EHC); - DA tracking	- - DA tracking	- - DA tracking
Design Review Panel	Yes – Waverley/ Randwick Design Review Panel (joint panel with Waverley Council)	Yes – Design Review Panel	Yes – Waverley/ Randwick Design Review Panel (joint panel with Waverley Council)	N/A – Rely on in-house urban designer officers and internal Applications Assessment Panel (consisting of senior management and	Yes – Sydney Design Advisory Panel for reviewing development applications and capital works projects

²¹ Source: Local Development Performance Monitoring – Department of Planning and Environment

				specialist staff of Council)	
Design Excellence initiatives	Randwick City Biennial Urban Design Awards; Randwick Architecture Talks / Architecture on Show; Design Ideas for Rejuvenating Residential Flat Buildings guideline	-	Waverley Design & Heritage Awards; Architecture / design talks	Woollahra Heritage Conservation Awards (established in 1985); Architecture on Show	City Talks
LEP Design Excellence Clause	Yes – applies to new buildings or external alterations on major sites and developments more than 15m in height	Yes – applies to Mascot Station Precinct and British American Tobacco Australia site only	-	-	Yes – applies to new buildings and external alterations to existing buildings

COMPARISON OF PLANNING APPROACH TO THE NATURAL AND BUILT ENVIRONMENT AND FUTURE GROWTH

The following table compares the overarching aims of the LEPs of the study group to indicate the individual councils’:

- Relative emphasis on protection of the natural environment
- Relative emphasis on conservation of the built heritage and promotion of good urban design
- General approach to growth and development

	Natural Environment	Built Heritage and Urban Design	Approach to Growth
Randwick (Randwick LEP 2012)	Emphasis on the natural environment – High <ul style="list-style-type: none"> • <i>To promote the importance of ecological sustainability in the planning and development process</i> • <i>To protect, enhance and promote the environmental qualities of Randwick</i> • <i>To ensure the conservation of the environmental heritage, aesthetic and coastal character of Randwick</i> 	Emphasis on built heritage and urban design – High <ul style="list-style-type: none"> • <i>To foster a liveable city that is accessible, safe and healthy with quality public spaces and attractive neighbourhoods and centres</i> • <i>To achieve a high standard of design in the private and public domain that enhances the quality of life of the community</i> • <i>To ensure the conservation of the environmental heritage, aesthetic and coastal character of Randwick</i> • <i>To acknowledge and recognise the connection of Aboriginal people to the area and to protect, promote and facilitate the Aboriginal culture and heritage of Randwick</i> 	<p>The Randwick LEP focuses future growth in and around town centres and the Randwick Education and Health Strategic Centre, as well as along transport corridors. The provision of affordable housing and promotion of social equity are expressly stated in the Aims.</p> <ul style="list-style-type: none"> • <i>To support a diverse local economy and business and employment opportunities for the community</i> • <i>To support efficient use of land, vibrant centres, integration of land use and transport, and an appropriate mix of uses</i> • <i>To promote sustainable transport, public transport use, walking and cycling</i> • <i>To facilitate sustainable population and housing growth</i> • <i>To encourage the provision of</i>

	Natural Environment	Built Heritage and Urban Design	Approach to Growth
			<p><i>housing mix and tenure choice, including affordable and adaptable housing, that meets the needs of people of different ages and abilities in Randwick</i></p> <ul style="list-style-type: none"> • <i>To promote an equitable and inclusive social environment</i> • <i>To promote opportunities for social, cultural and community activities</i>
Botany Bay (Botany Bay LEP 2013)	Emphasis on the natural environment - Medium <ul style="list-style-type: none"> • <i>To identify and conserve those items and localities that contribute to the local built form and the environmental and cultural heritage of Botany Bay</i> • <i>To protect and enhance the natural and cultural landscapes in Botany Bay</i> 	Emphasis on built heritage and urban design – Medium <ul style="list-style-type: none"> • <i>To identify and conserve those items and localities that contribute to the local built form and the environmental and cultural heritage of Botany Bay</i> • <i>To protect and enhance the natural and cultural landscapes in Botany Bay</i> • <i>To create a highly liveable urban place through the promotion of design excellence in all elements of the built environment and public domain</i> 	<p>The Botany Bay LEP emphasises economic growth and development with a focus on the port and airport transport gateways.</p> <ul style="list-style-type: none"> • <i>To recognise the importance of Botany Bay as a gateway to Sydney, given its proximity to Sydney (Kingsford Smith) Airport and Port Botany</i> • <i>To encourage sustainable economic growth and development</i> • <i>To provide direction concerning growth and change in Botany Bay</i> • <i>To promote residential amenity</i>

	Natural Environment	Built Heritage and Urban Design	Approach to Growth
Waverley (Waverley LEP 2012)	Emphasis on the natural environment - Medium <ul style="list-style-type: none"> <i>To enhance and preserve the natural environment through appropriate planning, protecting the integrity of natural systems and by protecting existing trees</i> <i>To identify and conserve the cultural, environmental, natural, aesthetic, social and built heritage of Waverley</i> 	Emphasis on built heritage and urban design – Medium <ul style="list-style-type: none"> <i>To provide an appropriate transition in building scale around the edge of the commercial centres to protect the amenity of surrounding residential areas</i> <i>To identify and conserve the cultural, environmental, natural, aesthetic, social and built heritage of Waverley</i> 	<p>The Waverley LEP places great importance on the growth and development of Bondi Junction as the primary cultural and commercial centre in the Eastern Suburbs, and the provision of housing of different densities to meet the needs of the community.</p> <ul style="list-style-type: none"> <i>To promote and co-ordinate a range of commercial, retail, residential, tourism, entertainment, cultural and community uses to service the local and wider community</i> <i>To maintain and reinforce Bondi Junction as the primary commercial and cultural centre in Sydney's eastern suburbs</i> <i>To provide for a range of residential densities and range of housing types to meet the changing housing needs of the community</i> <i>To protect, maintain and accommodate a range of open space uses, recreational opportunities, community facilities and services available to the community</i>

	Natural Environment	Built Heritage and Urban Design	Approach to Growth
Woollahra (Woollahra LEP 2014)	Emphasis on the natural environment – High <ul style="list-style-type: none"> <i>To conserve built and natural environmental heritage</i> <i>To protect amenity and the natural environment</i> <i>To minimise and manage stormwater and flooding impacts</i> <i>To minimise excavation and manage impacts.</i> 	Emphasis on built heritage and urban design – High <ul style="list-style-type: none"> <i>To conserve built and natural environmental heritage</i> <i>To protect and promote public access to and along the foreshores</i> <i>To promote a high standard of design in the private and public domain</i> <i>To ensure development achieves the desired future character of the area</i> 	<p>The Woollahra LEP provides for growth and population increase in and around local centres and shopping strips that are well serviced by public transport.</p> <ul style="list-style-type: none"> <i>To ensure that growth occurs in a planned and co-ordinated way</i> <i>To promote the management, development, conservation and economic use of property</i> <i>To provide for an appropriate balance and distribution of land for commercial, retail, residential and tourist development and for recreation, open space, entertainment and community facilities</i> <i>To provide greater population densities in and around centres that are well serviced by public transport</i> <i>To facilitate opportunities, in suitable locations, for diversity in dwelling density and type</i> <i>To minimise and manage traffic and parking impacts</i>

	Natural Environment	Built Heritage and Urban Design	Approach to Growth
City of Sydney (Sydney LEP 2012)	Emphasis on the natural environment – High <ul style="list-style-type: none"> <i>To promote ecologically sustainable development</i> <i>To conserve the environmental heritage of the City of Sydney</i> <i>To protect, and to enhance the enjoyment of, the natural environment of the City of Sydney, its harbour setting and its recreation areas</i> 	Emphasis on built heritage and urban design – High <ul style="list-style-type: none"> <i>To achieve a high quality urban form by ensuring that new development exhibits design excellence and reflects the existing or desired future character of particular localities</i> <i>To conserve the environmental heritage of the City of Sydney</i> 	<p>The Sydney LEP aims to reinforce the continued development of the City as the primary economic heart in Metropolitan Sydney for business, education and cultural activities. It articulates the importance of transit oriented development through the integration of land use, density and transport and strengthening of local centres. The promotion of affordable housing is clearly stated as a key Aim.</p> <ul style="list-style-type: none"> <i>To reinforce the role of the City of Sydney as the primary centre for Metropolitan Sydney</i> <i>To support the City of Sydney as an important location for business, educational and cultural activities and tourism</i> <i>To encourage the economic growth of the City of Sydney by:</i> <ul style="list-style-type: none"> <i>(i) providing for development at densities that permit employment to increase, and</i> <i>(ii) retaining and enhancing land used for employment purposes that are significant for the</i>

	Natural Environment	Built Heritage and Urban Design	Approach to Growth
			<p><i>Sydney region</i></p> <ul style="list-style-type: none"> • <i>To encourage the growth and diversity of the residential population of the City of Sydney by providing for a range of appropriately located housing, including affordable housing</i> • <i>To enable a range of services and infrastructure that meets the needs of residents, workers and visitors</i> • <i>To ensure that the pattern of land use and density in the City of Sydney reflects the existing and future capacity of the transport network and facilitates walking, cycling and the use of public transport</i> • <i>To enhance the amenity and quality of life of local communities</i> • <i>To provide for a range of existing and future mixed-use centres and to promote the economic strength of those centres</i>

ENDNOTES

ENDNOTES

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a sense of community