



AMENDMENT C269: EXPERT EVIDENCE OF JULIAN SZAFRANIEC

SEPTEMBER 2021

Prepared for

City of Yarra

Independent
insight.



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SUMMARY OF EVIDENCE

1. I (Julian Szafraniec) have been instructed by Maddocks acting on behalf of the City of Yarra to provide expert evidence regarding Planning Scheme Amendment C269 (the Amendment).
2. I have been asked to consider the impact of the proposed Amendment on the demand and realisation of residential and commercial development within the City of Yarra.
3. A summary of my evidence is as follows:
4. In relation to residential development, I find that
 - Key background documents to the Amendment (the Spatial Economic and Employment Strategy and the Housing Strategy) were both based on Victoria in Future 2016 (VIF16) population projects. This estimated that an additional 13,431 (occupied) dwellings will be added to the City of Yarra between 2016 and 2031.
 - Recent actual ABS data (to June 2020) and pre-COVID forecasts have greater population and housing growth (compared to VIF16) and estimate continued higher demand from 2031 to 2036. VIF19 and id.forecast (August 2018) estimates an additional 16,308 and 20,661 total dwellings from 2021 to 2036 respectively.
 - The impacts of COVID-19, while still very uncertain, have likely reduced population and housing levels at 2036 by up to 6 per cent. This results in a similar level as was originally forecast in VIF16. This reduced demand will be particularly acute for the next 2 to 3 years. The nature of housing demand is also likely to have shifted with greater demand for larger dwellings (i.e. more bedrooms/space in apartments and a shift to (semi)detached dwellings).
 - From a housing capacity perspective, the 12 largest Activity Centres¹ in the City of Yarra are estimated to have capacity to accommodate between 26,220 and 32,780 additional dwellings. In addition, locations outside these 12 Activity Centres could accommodate a modest level of housing development, consistent with the Housing Strategy framework plan, although this has not been explicitly estimated.

From this analysis, I believe the Amendment provides sufficient housing capacity across a range of locations to support housing demand requirements out to 2036 even with the

¹ Defined as the five Major Activity Centres (Swan Street, Bridge Road, Victoria Street, Smith Street and Brunswick Street) and the seven Neighbourhood Activity Centres (Johnston Street, Queens Parade, Rathdowne Street (NAC), Gertrude Street, Heidelberg Road, St Georges Road and Nicholson Street)

uncertainties regarding COVID impacts. It will enable most of the housing growth to be targeted in to Major and Neighbourhood Activity Centres, while still allowing some development and change outside these areas.

5. In relation to employment development, I find that

- The Yarra SEES (background document to the Amendment) provides employment and floorspace forecasts for the City of Yarra to 2031. The SEES forecasts total employment in the City of Yarra will increase by 50,000 jobs, while there will be a modest (270,000 square metres) increase in the aggregate quantum of employment floorspace. However, the uses and activities that occur in that employment floorspace will change significantly; there will be reduced demand for low-intensity industrial space and strong growth in more intensive service based floorspace such as retail, hospitality, commercial office, health services and creatives.
- There will be continued employment and economic growth beyond 2031. Based on pre-COVID employment forecasts developed by SGS, I estimate there will be 48,000 additional jobs in the City of Yarra from 2021 to 2036, requiring a total of 460,000 square metres of additional employment floorspace.
- The level of employment in Yarra has likely been more heavily impacted by COVID than the average across greater Melbourne. While total employment in Yarra had returned to pre-COVID levels before the recent Delta outbreak, some sectors, more directly impacted by lockdowns (e.g. hospitality), have not and will take significant time to recover (potentially 2 to 3 years). In addition, although uncertain, it is likely that post-COVID the nature of demand for employment spaces and locations will also change to some degree (further discussed at paragraph 84). However, most trends are likely to be an acceleration of existing patterns and the fundamentals of Yarra's economy and the need for employment space will largely remain.
- While it is clear there will be reduced demand for employment space in the short term (next 2-3 years), it is unclear how these effects from COVID-19 will impact Yarra in the medium to long term. Therefore, I believe it is still reasonable and appropriate to plan for a similar scale of employment floorspace demand until additional information is available.
- Based on the SEES there was a total Yarra-wide employment floorspace capacity of 4.9 million square metres. In 2016 the SEES estimated total Yarra wide occupied employment floorspace at 3.59 million square metres, representing 73 per cent of total capacity. The 2036 forecast employment floor space estimate of 4.2 million square metres would account for 86 per cent of total employment floor space capacity. This comparison

suggests that Yarra's overall capacity for growth in employment floor space exceeds forecast demand.

- From this analysis, I believe the Amendment provides sufficient employment capacity across employment precincts and Activity Centres to support changing employment demand requirements out to 2036 and beyond.
6. In addition, I have reviewed the draft Amendment (Panel Version) from an economic perspective I believe it is consistent with the recommendations in the SEES and Housing Strategy, and will support housing and employment growth into the future.

1. INTRODUCTION

1.1 Credentials

7. My full name is Julian Wincenty Szafraniec. I am a Principal, Partner and Director of SGS Economics & Planning Pty Ltd, based in the firm's Melbourne office at Level 14, 222 Exhibition Street, Melbourne, VIC, 3000.
8. I hold the following academic qualifications:
 - Bachelor of Economics (Econometrics) (Honours) (Monash University)
9. I have over 12 years' experience in applying economic theories and models to urban and regional issues across Australia and internationally. I have provided advice to all tiers of government and the private sector, related to the dynamics of population, housing, transport, retail, employment and the economy generally.
10. I have previously presented expert evidence at Planning Panels Victoria hearings.
11. Additional information regarding my experience is included in Attachment A.

1.2 Instructions

12. I have been instructed by Maddocks acting on behalf of the City of Yarra to undertake the following tasks as part of my expert witness report:
 - *review the exhibited Amendment documentation, as well as the 'Panel version' documentation;*
 - *prepare a statement of evidence and appear as an expert witness at the Panel Hearing, listed to commence on 4 October 2021 (pre-set dates). Your expert witness report should:*
 - *be prepared in accordance with the Guide to Expert Evidence;*
 - *not refer to any submitter by name (please use submission number);*
 - *express your opinion on the Amendment insofar as it relates to your area of expertise. In particular, we ask that you consider the impact of both the exhibited Amendment documentation, as well as the 'Panel version' documentation on residential and commercial developments within the City of Yarra, including:*
 - *identifying the projected demand for residential and commercial development within the City of Yarra (based on an up to date projection of at least 15 years);*

- *whether, if approved, the exhibited or preferred versions of the Amendment would impact upon the realisation of housing growth rates within the City of Yarra, and if so, how;*
 - *whether, if approved, the exhibited or preferred versions of the Amendment would impact upon the realisation of commercial growth rates within the City of Yarra, and if so, how;*
 - *the impact of the COVID-19 pandemic on the assumptions in the Yarra Housing Strategy and SEES;*
 - *the impact of the COVID-19 pandemic on population growth, and the impact of that growth on housing projections for Yarra;*
 - *express your opinion on the key issues, as relevant to your expertise, raised by submissions to the Amendment (see further comment on this below) and the Council position in respect of those matters.*
13. The full Brief to Expert provided by Maddocks is included at Attachment B.

1.3 Expertise relevant to Planning Scheme Amendment C269

14. I am an urban economist and have expertise in retail, employment and demographic forecasting, economic analysis and providing related policy advice.
15. I led the analysis components of the City of Yarra Spatial Economic and Employment Strategy (SEES) developed by SGS in 2018. I am able to comment on the preparation and findings of the SEES and other matters that are relevant to the Amendment and my area of expertise.

1.4 Evidence preparation

16. I prepared this statement of evidence and the opinions in this statement are my own.
17. In the preparation of this statement, I have reviewed and relied on the following documents:
- The Exhibited and Panel versions of the Amendment C269 including:
 - Submissions to the Amendment C269 as referred to me by Maddocks
 - The Council Officer Report of 3 August 2021
 - Relevant background reports to the Amendment C269 including:
 - Activity Centres – Roles and Boundaries, City of Yarra (October 2019)
 - Yarra Housing Strategy, City of Yarra (September 2018)
 - Yarra Spatial Economic and Employment Strategy, SGS Economics (2018) (SEES)
 - Building for Diversity – Yarra’s Social and Affordable Housing Strategy, Yarra City Council (November 2019)

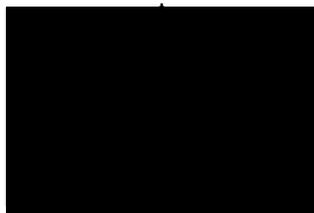
- Relevant expert witness reports prepared for previous City of Yarra Amendments, including the revised Residential Capacity in Activity Centres analysis as prepared by my colleague, Andrew Spencer who is presently unavailable:
 - Evidence Statement of Andrew Spencer, Amendment C220 (October 2018)
 - Evidence Statement of Andrew Spencer, Amendment C231 (August 2019)
 - Evidence Statement of Andrew Spencer, Amendment C191 (November 2019)

Limitations

18. My evidence has relied on the latest available housing and employment capacity information. This includes employment floorspace capacity from the SEES (finalised in 2018) and Housing capacity for the 12 Activity Centres from Andrew Spencers Amendment C191 evidence statement (completed in November 2019).
19. Capacity estimates are limited by the information available at that time. In particular, the Housing Capacity estimates for Johnston Street, Queens Parade and Swan Street were based on the preferred DDO controls considered by the Planning Panel in those Amendments and not the final adopted controls. I have further discussed this matter at paragraph 59 of my statement.

1.5 Declaration

20. I have made all enquiries that I believe are desirable and appropriate and no matters of significance which I regard as relevant have to my knowledge been withheld from the Panel.



Julian Szafraniec

Principal | Partner | Director

SGS Economics and Planning Pty Ltd

20 September 2021

2. BACKGROUND

2.1 Summary of previous studies undertaken for Council

21. SGS have provided advice to Council on a range of economic and planning matters over the period 2014 to 2019 that I and my colleagues at SGS have been involved in.

Spatial Economic and Employment Strategy (SEES)

22. In 2014 SGS were engaged by Council to prepare the Yarra SEES. I led the employment and economic analysis components of that study and was involved throughout.
23. The purpose of this study was to provide analysis and advice to aid Council to understand and capitalise on Yarra's economic strengths and respond to key trends and economic drivers over the next 10 to 15 years. The SEES included estimates of floor space demand to 2031 and employment floor space capacity, for all of Yarra's retail and employment precincts. While not a direct focus of the SEES, it acknowledged the mixed-use nature of much of Yarra, and the important role of new housing development in and around activity centres, where residents will benefit most from good access to transport, services and facilities.
24. The SEES can be thought of as a 'future proofing strategy' for employment in Yarra. For the most part it recommends Yarra's employment land be kept for employment, retaining zones that prohibit residential development. Some exceptions are noted in Strategic Direction 5 of the SEES for locations where "specific strategic planning work has been undertaken and supports a zone change."
25. The SEES was finalised in 2018. The process of drafting and finalising the SEES included two stages of community consultation. Early in 2018 the employment forecasts in the SEES were updated, drawing on the 2016 Victoria-in-Future population projects (VIF16) and data from the 2016 ABS Census, resulting in an increase in the employment growth forecasts.

Residential Capacity in Activity Centres (RCAC)

26. Later in 2018 SGS developed a dynamic model for Council to assess the residential growth potential in the 12 Activity Centres² – the Residential Capacity in Activity Centres (RCAC) model. I was not involved in this work, which was led by my colleague Andrew Spencer.
27. The RCAC model is an interactive spreadsheet designed to interrogate residential development capacity and take-up (that is, the realisation of new development). The model allows various parameters to be adjusted and the results are immediately updated. User adjustable parameters include assumptions concerning land available for redevelopment, proposed building heights, floor space mix (residential vs non-residential), site cover and building efficiency. Alongside the model, SGS also produced a report (June 2018) which provided preliminary outputs and user instruction for the RCAC model.

Expert Witness Statements using the RCAC prepared by Andrew Spencer

28. In November 2018 Andrew Spencer prepared an expert evidence statement in relation to Amendment C220 (Johnston Street). As part of that work, the RCAC model was updated and assumptions for Johnston Street were revised and updated to reflect the preferred controls being considered by the Planning Panel in Amendment C220.
29. In August 2019 Andrew Spencer prepared an expert evidence statement in relation to Amendment C231 (Queens Parade). As part of that work, the RCAC model assumptions for Queens Parade was further revised and updated to reflect the preferred controls being considered by the Planning Panel in Amendment C231.
30. In November 2019 Andrew Spencer prepared an expert evidence statement in relation to Amendment C191 (Swan Street). As part of that work, the RCAC model assumptions for Swan Street was further revised and updated to reflect the preferred controls being considered by the Planning Panel in Amendment C191. This evidence statement by Andrew Spencer has the most up to date data and incorporates the preferred controls from all previous revisions from the C220 and C231 Amendments. This evidence statement by Andrew Spencer has formed the basis of my assessment of capacity within Yarra’s Activity Centres in this report.

² Defined as the five Major Activity Centres (Swan Street, Bridge Road, Victoria Street, Smith Street and Brunswick Street) and the seven Neighbourhood Activity Centres (Johnston Street, Queens Parade, Rathdowne Street (NAC), Gertrude Street, Heidelberg Road, St Georges Road and Nicholson Street)

2.2 Summary of Amendment C269

31. The draft Planning Scheme Amendment C269 (**Amendment**) for Yarra City Council seeks to update the local policy in the Yarra Planning Scheme via a series of amendments to the Municipal Strategic Statement (MSS) and the Local Policies within the Planning Policy Framework (PPF), consistent with the structure recently introduced by the State Government via Amendment VC148.
32. As set out in the explanatory report, the Amendment is required to facilitate the integration of the new local policy into the PPF.
33. The updated planning scheme structure introduces the new Municipal Planning Strategy (MPS) at Clause 02, which consists of a succinct expression of the overarching strategic policy directions. It also introduces new and revised local policy content in the PPF (at Clauses 11,12,13,15,16,17,18 and 19), Particular Provisions (at Clause 52.28) and Operational Provisions (at Clause 72.04, 72.08 and 74.01). In the Operational Provisions, a new Schedule to Clause 72.08 is proposed, that contains a list of background documents to underpin the MPS and local policies in the PPF. The documents include new strategies previously adopted by Council, such as the *Activity Centres – Roles and Boundaries* (City of Yarra, October 2019), and previously adopted documents such as the *Yarra Spatial Economic and Employment Strategy* (SGS, 2018) (SEES) and *Yarra Housing Strategy*, City of Yarra (September 2018).
34. The Amendment was exhibited from August to December 2020 and received 429 submissions (including late submissions). In the process of considering the submissions, Council has proposed recommended changes to some clauses of the local planning policy (referred to as the 'Panel Version' of the Amendment³). This includes changing the wording and correcting errors in the policy, inserting new objectives and strategies where appropriate, and consequential changes (as a result of the new PPF).
35. Further discussion regarding the economic basis of the policies is included in Section 3.1 of my statement of evidence.

³ I note in some documents the 'Panel' version of the Amendment has also been referred to as the 'Preferred' version of the Amendment. I understand these to be the same versions, simply referred to in different ways.

3. IMPACT OF THE AMENDMENT

3.1 Review of the Amendment evidence base and impact on residential and commercial development

36. As the Amendment considers the local policy and does not propose specific changes to planning controls, I have focused my assessment on a review of the appropriateness of the relevant background documents and their alignment with the Amendment. In particular, I have considered:
- Whether the exhibited or panel version of the Amendment would impact on the realisation of housing growth rates within the City of Yarra by reviewing the housing demand and capacity evidence base contained in the relevant background documents.
 - Whether the exhibited or panel version of the Amendment would impact on the realisation of employment growth rates within the City of Yarra by reviewing the employment demand and capacity evidence base contained in the relevant background documents.
 - How employment and residential growth have been balanced and jointly managed.
37. In doing this I have considered the appropriateness of that evidence base, given updated data and trends, including the potential impacts of COVID-19 on housing and employment.
38. As forecasts in the background documents only extend to 2031, I have also considered how the Amendment may address continued growth to 2036 (15 years from today).

3.2 Demand for housing in the City of Yarra

Previous population and housing demand forecasts

39. The SEES and Housing Strategy Amendment background documents were both based on VIF16 population projects. This estimated that an additional 29,412 residents and 13,431 (occupied) dwellings will be added to the City of Yarra between 2016 and 2031. This represents an average of 1,961 additional residents and 895 additional dwellings per year.
40. The latest version of Victoria in Future was released in 2019 (VIF19) by the Department of Environment, Land, Water and Planning (DELWP). That release estimates an additional 32,970 residents and 16,540 (occupied) dwellings will be added to the City of Yarra between 2016 and 2031 – a higher forecast than the previous release. To accommodate the additional household (or occupied dwellings) VIF19 estimates that 18,483 additional total dwellings

would be required. This accounts for expected vacancy rates or unoccupied dwellings within the housing market. This represents an average of 2,197 additional residents and 1,103 occupied dwellings (1,232 total dwellings) per year.

41. In addition, VIF19 forecast 31,549 residents and 16,308 total dwellings over the period 2021 to 2036 (the next 15 years). This represents an annual growth of 2,103 additional residents and 1,087 additional total dwellings per year, over the period 2021 to 2036.
42. Council separately engaged Informed Decisions (id) consultants to forecast population and dwellings for the City of Yarra in 2018. This data is publicly available on the forecast.id website⁴. These estimate a higher population and dwelling forecast than both VIF16 and VIF19. Id forecasts 38,738 residents and 20,661 total dwellings over the period 2021 to 2036. This represents an annual growth of 2,583 additional residents and 1,377 additional total dwellings per year over the period 2021 to 2036.

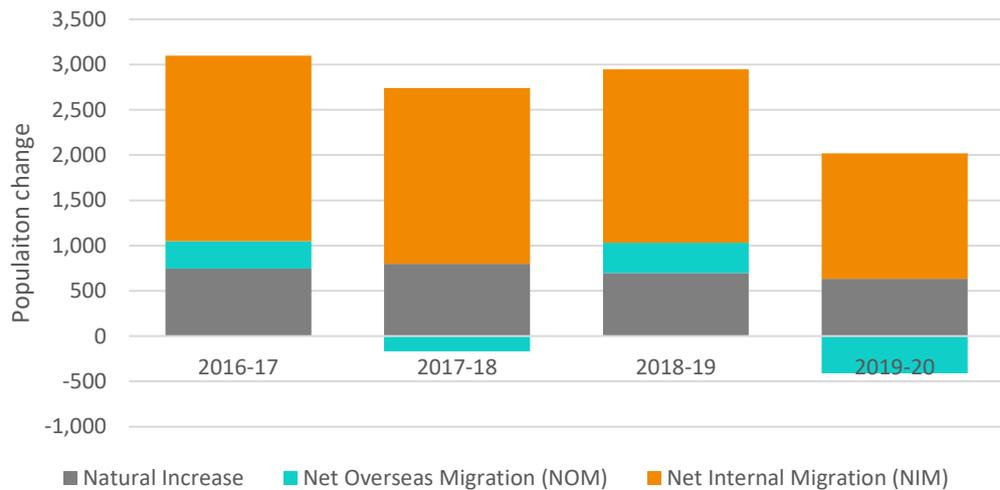
Recent data on actual growth

43. The Australian Bureau of Statistics (ABS) has released population estimates for the City of Yarra out to June 2020⁵. There is no updated comprehensive dataset of actual dwelling stock since the 2016 Census or 2016 Housing Development Data. However, updated housing supply information is available and further discussed in at paragraph 71.
44. Figure 1 presents recent actual population growth for the City of Yarra by components of growth. Over the period 2016 to 2019 the City of Yarra added an average of 2,874 additional residents per year. This actual rate of growth is between 11 to 46 per cent above forecast rates as discussed in paragraphs 39-42. Population growth dropped to 1,609 additional residents in 2019 to 2020, primarily due to impacts of the COVID-19 pandemic which have heavily impacted Net Overseas Migration (NOM) in particular, further discussed below.

⁴ <https://forecast.id.com.au/yarra>

⁵ <https://www.abs.gov.au/statistics/people/population/regional-population/2019-20>

FIGURE 1 COMPONENTS OF POPULATION GROWTH, CITY OF YARRA



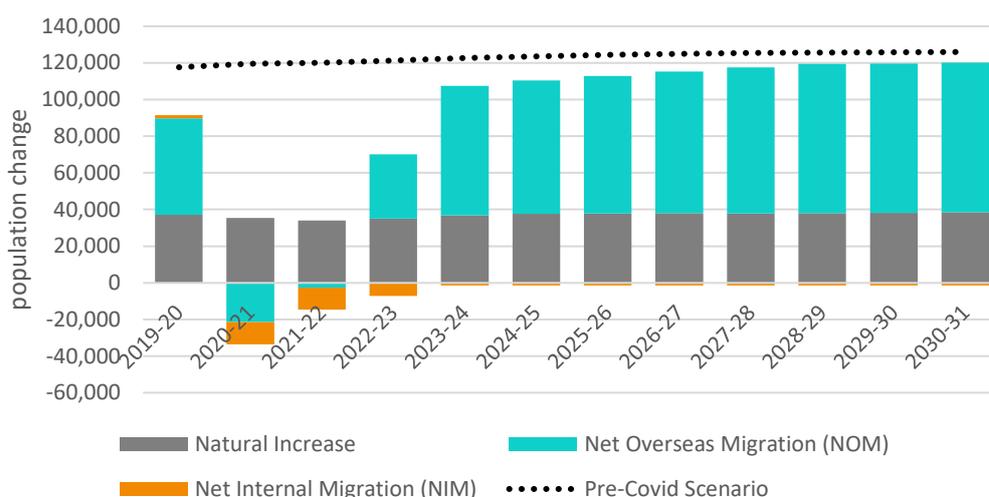
Source: Regional Population, ABS, March 2021

Potential impacts of COVID-19 on population and housing demand

45. The COVID-19 pandemic has had significant health and economic impacts globally, and for the City of Yarra. COVID-19 first started to impact Australia in March 2020. Since that time various restrictions have been introduced to stop the spread of the virus. These restrictions have had profound impacts on society including population growth and economic activity.
46. In addition, at the time of writing this report the pandemic is still unfolding (with Melbourne currently in lockdown) and the ultimate short-term and long-term recovery impacts still very uncertain. However, some data from the initial stages of the pandemic and related research provide an indication of the potential impacts it will have on population and dwelling growth.
47. COVID-19 restrictions have had direct impacts on the flow of overseas migrants in and out of Australia and have indirectly impacted the internal flows and housing preferences of existing Australian residents. Based on the latest ABS data and research, the federal government Centre of Population has developed COVID-19 population projection scenarios for all States and Capital Cities⁶. Figure 2 presents the COVID-19 population projections by components of growth for Greater Melbourne. At the time of their release (in December 2020) they were considered quite conservative/pessimistic. However, subsequent data releases along with ongoing challenges related to the Delta variant outbreaks and the vaccine rollout have suggested they present a reasonable future outlook, given the high degree of current uncertainty.

⁶ <https://population.gov.au/data-and-forecasts/data-and-forecasts-projections.html>

FIGURE 2 FORECAST COMPONENTS OF POPULATION GROWTH, GREATER MELBOURNE, COVID SCENARIO



Source: Centre for Population, December 2020

48. Key implications and relevance to this Amendment are as follows:

- As a result of the COVID-19 pandemic and associated restrictions, population growth is likely to be heavily impacted for the next 2 years (until 2022-23). From 2024 there will still be a small lasting impact on population growth. As a result of the reduced population growth under the COVID scenario, Greater Melbourne’s population is estimated to be 6 per cent lower than a pre-COVID scenario by 2031 (6,164,400 people as compared to 6,555,500 people).
- The impact of COVID-19 has varied significantly by population growth component:

 - Net Overseas Migration (NOM)** has been impacted the most due to both restrictions on new migrants coming to Australia, and people returning home (from overseas) during the pandemic. The vast majority of overseas migrants come to Australia’s major cities (i.e. Melbourne and Sydney) and historically NOM has been the largest components of population growth. As a result, 85 per cent of the reduction in Greater Melbourne’s population growth is attributed to reduced NOM.
 - Historically only 5 per cent of the City of Yarra’s population growth has come from NOM (see Figure 1). This suggests Yarra might be less impacted (in terms of population and dwelling growth) than other parts of Greater Melbourne.
 - Net Internal Migration (NIM)** represents existing Australian residents moving house within Australia (e.g. a person moving from Richmond to Geelong). While there has been significant commentary in the media regarding an ‘exodus from the big cities to the regions’, currently available data suggest the effect has been relatively small in the context of the overall population growth. During the second half of 2020 when

Greater Melbourne was in an extended lockdown and the rest of Australia was largely open, NIM for Greater Melbourne dropped from around 1,500 (pre-COVID) to negative 7-8,000 people per quarter (impacting growth by about 20 per cent). It has since largely returned to a stable or slightly negative level. Overall, the Centre of Population estimates 10 per cent of the reduction in Greater Melbourne's population growth is attributed to reduced NIM.

- Historically 70 per cent of the City of Yarra's population growth has come from NIM. However, data up to June 2020 indicates NIM in Yarra reduced by 30 per cent, significantly higher than the Greater Melbourne average. This is potentially due to additional shifts in location and housing type preferences resulting from COVID-19. While the full and lasting effect of these trends is unclear, they included:
 - Reduced demand for smaller dwellings (i.e. small apartments) as people seek greater private space due to the impacts of lockdown and increased levels of people working/studying from home.
 - Proximity to work and broader economic opportunities has reduced as a primary driver of location due to lockdowns and the potential for increased working from home post-COVID.

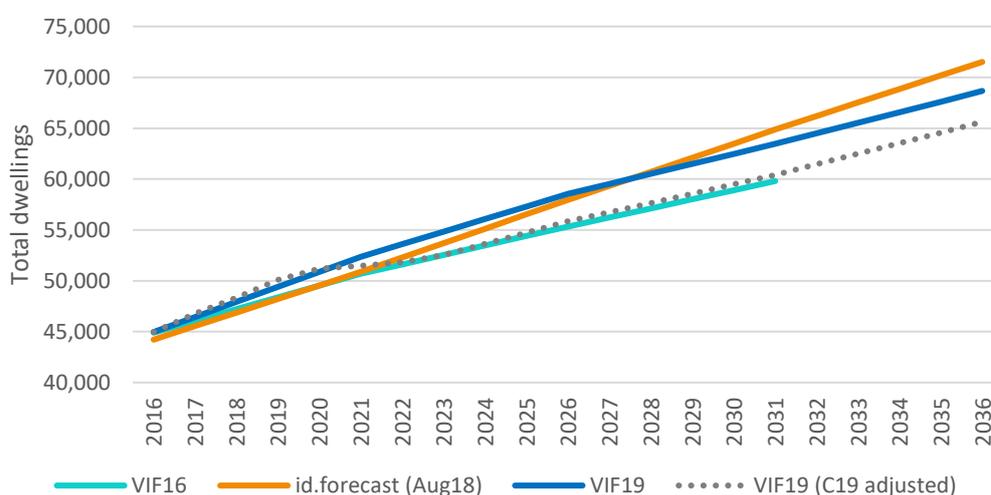
These trends suggest Yarra's NIM might be more heavily impacted than other parts of Greater Melbourne, where these factors are less dominant.

- **Natural Increases** represent the net effect of births and deaths on an area's local population. While there have been some minor fluctuations, natural increases have remained relatively stable and are forecast to remain relatively stable into the future.
 - This indicates population growth linked to natural increases is unlikely to be significantly impacted for the City of Yarra.
49. The ultimate impact of COVID-19 on dwelling demand in the City of Yarra is still uncertain. However, my analysis of available data and trends through paragraphs 45-48 suggests population could potentially be reduced (compared to pre-COVID forecast) by a similar proportion as is projected for Greater Melbourne (-6 per cent) if NIM was disproportionately impacted due to the additional spatial factors affecting inner city areas.
50. These trends are also likely to shift dwelling type preferences toward larger forms, both in terms of additional bedrooms/space and away from apartments to (semi) detached forms. Within the City of Yarra, this may disproportionately impact demand within Activity Centres as they are the focus of housing growth generally and include much of the high and moderate change areas which are proposed to contain more intensive development forms.

Overview of implications for housing demand and the Amendment

51. To understand the potential impact on housing demand and the Amendment specifically I have applied the overall Greater Melbourne COVID-19 population impacts (from Figure 2) to the VIF19 population and dwelling forecasts. This *adjusted* VIF19 total dwelling forecast along with other forecasts discussed is presented in Figure 3.
52. This indicates dwelling demand is likely to be lower than recent actual growth rates and more recent forecasts (VIF19 and id.forecast August 2018) and potentially more consistent with the original VIF16 – used in the SEES and Housing Strategy. This adjusted VIF19 forecast an additional 27,249 residents and 14,138 total dwellings over the period 2021 to 2036. This represents an average of 1,817 additional residents and 943 additional total dwellings per year over the period 2021 to 2036.

FIGURE 3 DWELLING DEMAND FORECAST COMPARISON, CITY OF YARRA



Source: VIF16 | VIF19 | id.forecast | SGS Economics and Planning

53. Based on this analysis, I believe, the City of Yarra will still need to plan for around 1,000 additional dwellings per year to support future housing demands out to 2036.

3.3 Housing capacity in the City of Yarra

54. This Amendment is informed and aligned with analysis and strategic recommendations contained in the City of Yarra's Housing Strategy, which forms a background document.
55. The City of Yarra's Housing Strategy includes a discussion of housing capacity in Chapter 8. While the Chapter includes discussion of the RCAC Model, which was prepared by SGS, the figures included in the Chapter 8 are not housing capacity estimates, but rather forecasts of housing supply (or likely development over a given period of time) informed by housing capacity, known developments in the pipeline, and recent development rates.

56. The Housing Strategy estimated supply of new dwellings across 12 Activity Centres alone could be in the order of 14,300 dwellings between 2016 and 2031. These housing supply estimates are based on the following assumptions:
- All dwellings in the development pipeline (at application stage, approved, or under construction) based on data from the 2017 Urban Development Program.
 - The continuation of the rate of dwelling supply that occurred in activity centres in between 2011 to 2016, for the 15 years to 2031.
57. Since the release of the Housing Strategy and initial development of the RCAC model in the first half of 2018, planning scheme amendments for three Activity Centres (Johnston Street, Queens Parade and Swan Street) have progressed and the detailed built form controls for these three areas have been refined. As a consequence, the original capacity modelling used in Council's Housing Strategy for these three centres has been superseded.
58. Revised estimates of housing capacity for these three centres, using the RCAC model, were provided in expert evidence statements prepared by Andrew Spencer in relation to Planning Scheme Amendment C220, C231 and C191 respectively. These updated capacity estimates are based on the preferred controls considered by the Planning Panels in each of those Amendments.
59. Since completion of that work, I understand there has been some additional changes to the controls in the final adopted versions provided to the Minister. I cannot say to what degree these additional changes would impact the capacity estimates as I have not analysed the preferred controls compared to the adopted controls.
60. Specific assumptions in the RCAC model vary by Activity Centre and sub-precinct based on relevant controls. These are detailed in full in the expert evidence statements of Andrew Spencer for Amendment C220, C231 and C191. However, broadly the RCAC model estimates housing capacity within 12 Activity Centres as follows:
- **Available land** is determined by excluding any sites in activity centres that have been recently developed, are strata-titled, or host public housing or community uses.
 - **Potential Yield** is then determined for Available Land based on built form assumptions with respect to site cover, setbacks, build heights, floorspace mix (residential and non-residential), net usable floorspace ratios and average dwelling sizes.
61. I have reproduced the revised housing capacity estimates from Andrew Spencers C191 evidence statement in the Table below. I have appended an additional column to the Table to test the impact of a higher average dwelling size (100 square metres as compared to 80 square metres as used in Andrew Spencers C191 evidence statement). This is to test the

potential impact on housing capacity within the 12 Activity Centres resulting from a sustained shift in housing preferences toward larger forms, as further discussed at paragraph 50.

62. The capacity analysis estimates the total potential capacity for new dwellings across the 12 Activity Centres is in the order of 26,220 to 32,780 dwellings.

TABLE 1 NET FLOORSPACE CAPACITY ESTIMATES – YARRA’S ACTIVITY CENTRES

Activity Centre	Total floor space capacity (sqm)	Employment floor space capacity (sqm)	Residential floor space capacity (sqm)	Dwelling capacity (@80 sqm per dw.)	Dwelling capacity* (@100 sqm per dw.)
Smith Street	594,400	93,300	501,100	6,260	5,010
Victoria Street	556,400	133,300	423,100	5,290	4,230
Bridge Road	458,000	109,100	348,800	4,360	3,490
Brunswick Street	419,800	84,900	334,900	4,190	3,350
Swan Street*	467,000	158,100	308,900	3,860	3,090
Johnston Street**	297,300	53,600	243,700	3,050	2,440
Alphington	223,700	35,100	188,500	2,360	1,890
Queens Parade***	185,100	53,200	131,900	1,650	1,320
Nicholson Street	111,200	44,500	66,700	830	670
St Georges Road	60,900	24,300	36,500	460	370
Gertrude Street	37,300	14,900	22,400	280	220
Rathdowne Street	25,900	10,400	15,600	190	160
Total	3,437,000	814,700	2,622,100	32,780	26,220

Source: Table 7, page 12 of Andrew Spencers C191 Evidence Statement

* I, Julian Szafraniec, have completed a dwelling capacity sensitivity test using 100 sqm per dwelling

63. I believe this data provides the most up to date estimate of housing capacity in the 12 Activity Centres and is generally consistent with Council strategic planning and this Amendment.
64. In addition to these 12 Activity Centre there will also be capacity for incremental growth within other small centres and established residential areas outside of designated centres. Capacity within these other locations has not been explicitly estimated within the Housing Strategy or in any supplementary reports of which I’m aware. However, the Housing Strategy indicates these areas combined have historically accommodated around 28 per cent of new dwellings (over the period 2005 to 2014). The Housing Strategy also further designates these other locations as either Minimal, Incremental or Moderate change areas with varied objectives around the scale and level of growth anticipated (Housing Strategy, Chapter 9).
65. Given this, and the fact these other locations include 36,000 existing dwellings and represent around 85 per cent of Yarra’s land area, I believe it reasonable to assume these areas could continue to accommodate some modest level of housing growth similar or slightly under their previous provision levels in the order of 20-25 per cent of new dwellings.

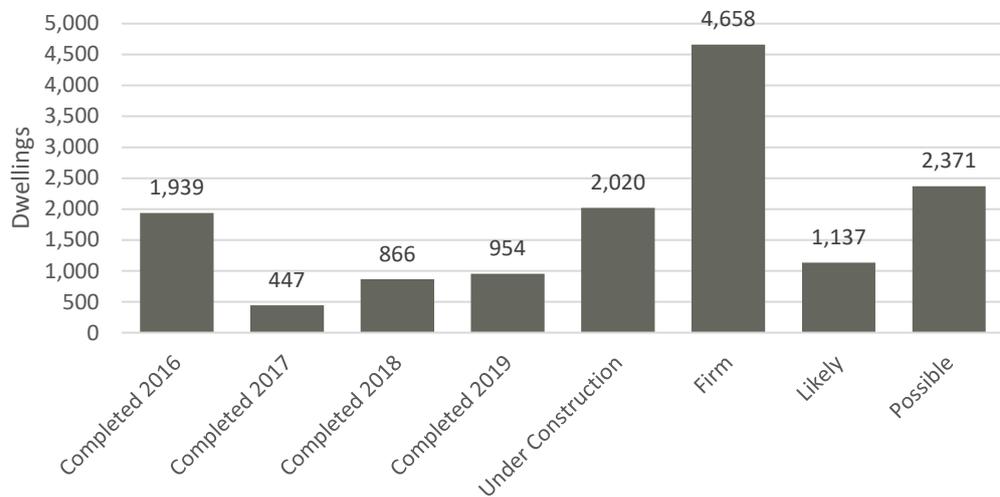
3.4 Comparison of housing demand and capacity

66. Section 3.2 indicates Yarra will need to accommodate 14,183 additional dwellings from 2021 to 2036. In addition, based on the same *adjusted* VIF19 data, it is estimated that Yarra has accommodated 6,507 over the last 5 years, from 2016 to 2021. Combined, this represents 20,644 total additional dwellings from 2016 to 2036. This represents between 63 to 79 per cent of the net capacity within the 12 Activity Centres (as at 2016) in Table 1.
67. However, it is unlikely all new housing will be provided within these 12 larger Activity Centres alone, given Strategic Directions in the Housing Strategy and as a result of potential recent shifts in housing preferences as a result of COVID-19 (discussed at paragraph 50).
68. If 25 per cent of housing demand was accommodated within these other Minimal, Incremental and Moderate change areas outside of the 12 Activity Centres, then housing demand to 2036 within the 12 Activity Centres would represent between 47 to 59 per cent of Capacity. That is, 15,483 dwelling demand from 2016 to 2036 (75 per cent of 20,644 dwellings) compared with 32,780 to 26,220 dwelling capacity.
69. This indicates there is sufficient capacity within the 12 Activity Centres to accommodate housing demand. In addition, I believe it is appropriate for there to be a surplus for the following reasons:
- To support future housing demand and growth beyond 2036. Given Yarra's proximity to the Central City and its excellent levels of transport infrastructure, services and amenity, it will continue to be a highly desired location into the future.
 - Housing Capacity is estimated through a set of assumptions based on planning controls and other information. It is unlikely 100 per cent of capacity can be fully realised within a given period of time across a large geographic area due to various localised site factors, individual landowner and developer decisions and other market forces.
 - A degree of surplus capacity generally enables better development outcomes as developers are not required to maximise yields on every single site.
70. 25 per cent of housing demand allocated across locations outside of the 12 Activity Centres would represent 5,000 additional dwellings over a 20 years (2016 to 2036, 15 years from today) or 250 additional dwellings per year from 2016 to 2036. This level of growth compared to the 2016 stock of 35,000 dwellings (outside the 12 Activity Centres) would represent a relatively modest level of change overall (0.8 per cent per annum). This would also represent a lower rate of development in these locations than recent years. Analysis of the 2016 Housing Development Data indicates these locations provided 480 additional

dwelling per year from 2011 to 2016. I believe this quantum of growth is reasonable and consistent with the Strategic Directions in the Housing Strategy.

71. As a further check, analysis of the latest 2019 Urban Development Program Major Redevelopment Sites data, which tracks developments greater than 10 dwellings, indicates there were 2,267 new dwellings completed between 2016 and 2019, and a further 10,186 are either under construction or in the development pipeline as of 2019. Combined this represents 12,453 dwellings or 62 per cent of housing demand requirements to 2036.
72. However, it should be noted it is likely many of these developments will currently be on hold or delayed due to the impacts of COVID-19 on both construction activity and market demand.

FIGURE 4 RECENT AND FUTURE HOUSING SUPPLY



Source: 2019 Urban Development Program

3.5 Impact of the Amendment on residential development

73. I believe the Amendment and Housing Strategy provides sufficient housing capacity to accommodate housing demand over the next 15 years. The Amendment also helps to direct housing into Major and Neighbourhood Activity Centres reducing pressure for growth in Minimal and Incremental Change Areas.

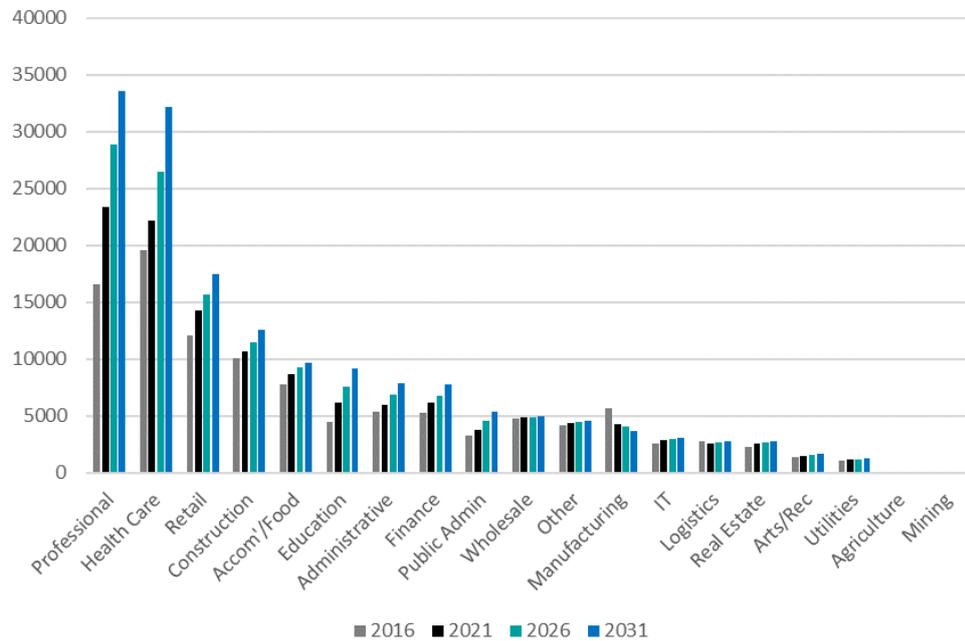
3.6 Demand for employment floor space in the City of Yarra

Previous employment and floorspace forecasts

74. The Yarra SEES provides employment and floorspace forecasts for the City of Yarra to 2031. The SEES forecasts total employment will increase by 50,000 jobs: from 98,000 jobs in 2016 to 148,000 in 2031. In addition, the Yarra economy will continue to experience significant

structural economic changes as employment shifts away from traditional industrial employment to population and knowledge-based services sectors (see Figure 5 below).

FIGURE 5 YARRA EMPLOYMENT PROJECTIONS BY INDUSTRY, ('000)



Source: Figure 16, page 31 of the SEES, SGS

75. Due to this structural change in the local Yarra economy, there will not be a significant increase in the aggregate amount of employment floorspace required. The SEES estimates Yarra accommodated 3,590,000 square metres of employment floor space in 2016 and will require 3,860,000 square metres by 2031 – a modest increase of 270,000 square metres.
76. However, the type of employment floorspace will change significantly as Yarra continues to shift away from traditional industrial low-intensity employment uses and towards less space intensive employment: retail, services office-based employment in knowledge and health sectors, and the creative industries. SEES also forecasts a small reduction in employment to floorspace ratios within each sector as a result of past trends, broader market forces and compositional changes within each sector.

Extended employment and floorspace forecasts

77. I have used SGS employment projections, produced in 2019, to extend the City of Yarra employment demand forecasts contained in the SEES out to 2036 (15 years from today). This indicates employment in the City of Yarra will continue to grow and structurally evolve toward more population and knowledge-based services. This would see total employment grow by a

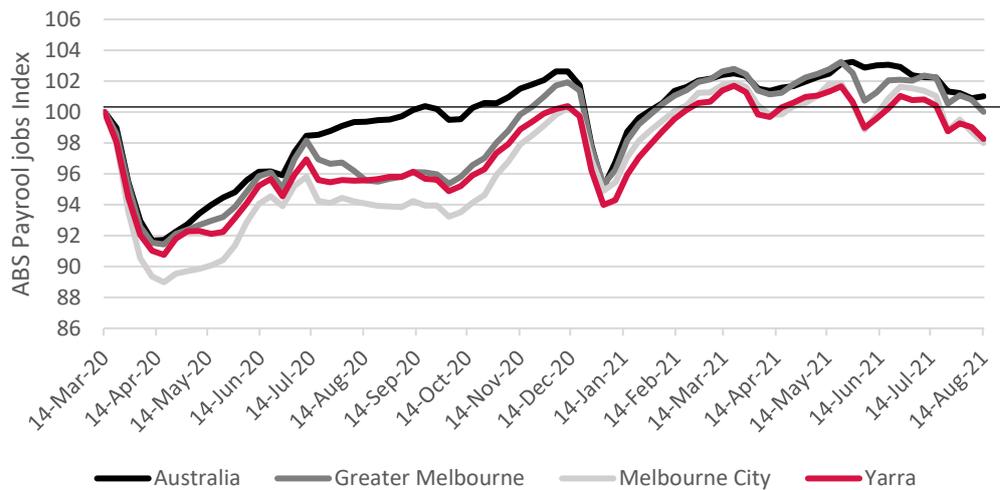
further 14,287 jobs from 2031 to 2036, representing a total growth in employment of 47,211 over the period 2021 to 2036.

78. By applying the same employment to floorspace ratios as using for 2031 in the SEES I have estimated that this level of employment in 2036 would require 4,180,000 square metres of employment floorspace.

Potential impacts of COVID-19 on employment demand

79. COVID-19 has had profound and varied impacts on the economy. While some of the short term impacts are now known, the final and lasting impacts are still uncertain.
80. The immediate recession during 2020 resulting from COVID-19 was unique. The public health responses of closed borders and restricted public activity caused an unprecedented loss of employment and economic output. However, government stimulus, social safety-net measures, and the fact that the recession was not driven by underlying weakness in the economy or financial markets meant that, unlike typical recessions, the initial recovery (in late 2020) was rapid once transmission was largely under control. Unfortunately, with the recent Delta outbreak, employment and economic activity is again being significantly impacted across Melbourne including the City of Yarra. However, a rapid rebound in economic activity is still expected, once the outbreak is controlled and vaccine targets are achieved.
81. Within this overarching picture, there has been significant spatial and sectoral variation in the scale of impacts and recovery to date. Figure 6 presents the ABS payroll jobs index for Yarra and some comparator locations. This presents the relative change in employment compared to a March 2020 reference point, at the start of the pandemic. This highlights that employment in Yarra has been impacted:
 - more acutely than the Greater Melbourne average
 - Less acutely than City of Melbourne, particularly during 2020.

FIGURE 6 PAYROLL JOBS INDEX (REFERENCE PERIOD MARCH 2020)



Source: Payroll Jobs Index, ABS, August 2021

82. Impacts have also varied significantly by sector. Employment in industries dependent on international travel and in-person interactions (e.g. hospitality) are yet to recover to pre-COVID employment levels. Conversely some industries have in fact seen strong employment and economic growth during the pandemic. Essential government and health services linked to managing the pandemic response have expanded over the period and essential and online retailing has also seen stronger than average growth over the period.
83. Once the effects of the pandemic subside there is likely to be some lasting effects on the nature of employment and the economy. I believe these will largely comprise the acceleration of existing or emerging trends.
84. Some key trends and their impact on Yarra and this Amendment include:
- Structural changes in the **retail sector** have likely been accelerated. Trends in online retail have effectively skipped forward 3-5 years, meaning reduced aggregate demand for physical retail floorspace. However, this will largely impact more commoditised retail shops and there will continue to be expanded opportunities for experience based retailers with unique products and services who are also able to access online communities and markets. This aligns well with Yarra’s retailers and recommendations detailed in the SEES.
 - Employment in **commercial office-based sectors** is likely to shift towards a more hybrid working model. Post-COVID, it is likely most workers will still come into a physical office some days, and will continue to work from home some days. However, when people do attend an office it will increasingly be for a purpose – a meeting, collaboratively

addressing a complex/abstract problem, a desire to be in a quality environment. As a result, the Central City and Yarra will likely continue to provide a compelling offer for both existing and new commercial office-based firms.

- **Health care** is likely to be further reinforced as the strongest employment growth sector in the economy. Various recovery and prevention programs will lead to further investment in health services, from research, pharmaceuticals, hospitals and other service. Given Yarra's established health economy, it likely to see significantly direct and flow on employment opportunities

85. How these and other unknown impacts will balance out in the economy is still unclear and will also be influenced by the remainder of the pandemic (i.e. if new variants prolong the pandemic) and other broader global factors (i.e. how the global economy recovers).

Implications for employment demand and the Amendment

86. Over the short term (within the next 2-5 years) there is likely to be reduced growth in demand for employment floorspace due to the direct impacts of the COVID-19 pandemic on both population growth and the economy.

87. However, over the medium to long term (within 5-15 years) demand for employment floorspace is likely to recover and the fundamentals of the Yarra economy, as detailed in the SEES and Amendment, are likely to still be sound.

88. Given this, I believe it is still appropriate to plan for a broadly similar level and composition of employment floorspace growth across the City of Yarra over the next 15 years.

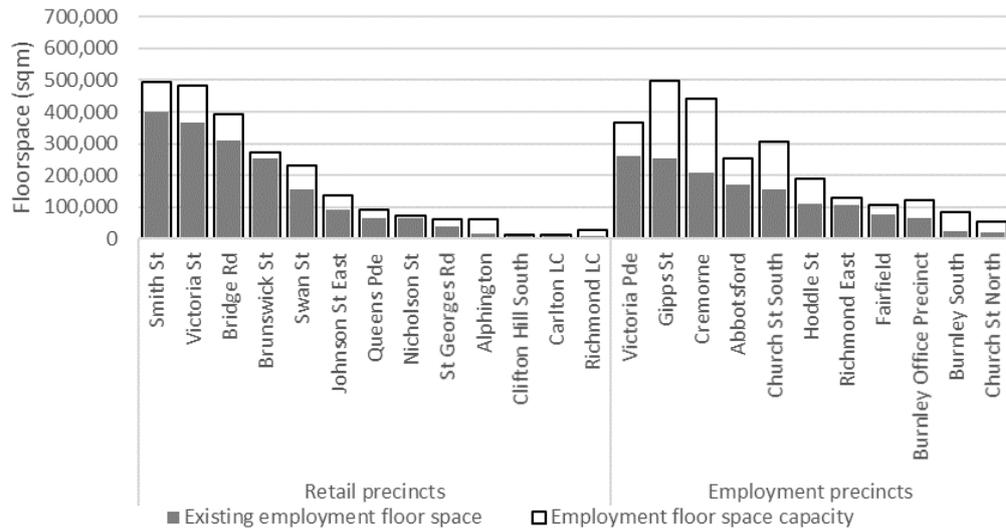
3.7 Capacity for employment floor space across the City of Yarra

89. Estimates of the capacity for employment floor space were also developed for the SEES. These were derived using high-level capacity assumptions, based on zone and location. A description of the approach and assumptions was included in Appendix A of the SEES.

90. Similar to housing capacity, it should be noted that the capacity estimates assume all sites are redeveloped to the average parameters described in Appendix A of the SEES. However, in reality not all sites will be redeveloped within a given timeframe (i.e. next 15 years) and sites that are developed might achieve higher or lower densities than the averages assumed. As a result, employment floor space capacity should be treated as indicative only, while still based on a logical process and set of assumptions.

91. The total estimated capacity for employment floor space in Yarra was estimated at 4.9 million square metres. This capacity varies by location with some centres, such as Brunswick St, being close to capacity, while others, such as Cremone, have significant growth potential.

FIGURE 7 EMPLOYMENT FLOORSPACE ESTIMATES: EXISTING AVS CAPACITY



Source: Figure 24, page 41 of SEES, SGS

3.8 Comparison of Employment floorspace demand and supply

92. The estimated total occupied employment floor space in Yarra in 2016 of 3.59 million square metres accounts for 73 per cent of the total Yarra-wide capacity estimate of 4.9 million square metres. The 2036 forecast employment floor space estimate of 4.2 million square metres would account for 86 per cent of total employment floor space capacity. This comparison suggests that overall Yarra’s capacity for growth in employment floor space exceeds forecast demand over the 15 years.

93. Over the short term there is likely to be a surplus of supply of employment floorspace. However, once the economy starts to recover it will be important to preserve this employment floorspace capacity to ensure Yarra’s local economy can capture this growth.

3.9 Impact of the Amendment on employment development

94. I believe the Amendment and SEES provide sufficient employment capacity to accommodate the growing and changing employment demand requirements of Yarra over the next 15 years and beyond.

3.10 Review of draft Amendment

95. The Amendment introduces a new MPS at Clause 02 and introduces new and revised local policy content at Clauses 11,12,13,15,16,17,18 and 19. I provide the following comments as to whether the proposed changes (included in the Panel Version) to the policies are consistent with the background documents and appropriate from an economic perspective.

Clause 02.03

96. The new MPS includes Strategic Directions related to a number of topics. I provide the following comments as relevant to my area of expertise:
- Under **Activity Centres** the MPS clearly defines the activity centre hierarchy which I support and believe generally aligns with the SEES and Housing Strategy. I have discussed this further at paragraph 97.
 - From an economic perspective the strategic directions importantly acknowledge:
 - Activity centres are a ‘focus of growth’, this will ensure Yarra is able to accommodate future demand (residential and employment) in locations which have the best access to transport, services and infrastructure.
 - The requirement to ‘plan and manage employment and residential opportunities’. The mixed use nature of Yarra’s activity centres is a key strength; as growth is directed into these locations this diversity of uses must be carefully managed, particularly during market cycles where one use is more feasible than another for a period of time.
 - Strategic directions also highlight the importance of high amenity, pedestrian friendly and well connected activity centres, which is critical to attracting higher order and creative employment services.
 - Under **Housing** the MPS highlights the need to direct housing growth to appropriate locations identified as ‘major regeneration areas’ and ‘areas within activity centres’ which I support from an economic perspective.
 - The strategic directions also identify a need to provide a diversity of housing types, including affordable housing which I also support.
 - Under **Economic Development** the MPS clearly states that ‘*Yarra has capacity for employment growth and is committed to supporting this growth in its employment areas in preference to residential development in these areas*’ which I strongly support and was a key recommendation from the SEES.

- The strategic directions further detail the diversity of employment within Yarra's economy including the arts, night time economy, health, education, commercial and creative services sectors, which I support and is consistent with the SEES.
- The strategic directions also seek to strengthen activity centres by 'facilitating adaptable and functional commercial spaces' which is particularly important from an economic perspective given the highly uncertain and evolving nature of the commercial office sector currently.

Clause 02.04 and Clause 11.03/17.01/17.02/17.04/19.02

97. Clause 02.04 presents the Strategic Framework Plan. This is then further detailed in Clauses 11.03, 17.01, 17.02, 17.04 and 19.02. While there are some minor differences in the boundaries contained in the Amendment as compared to the SEES and Housing Strategy, I do not believe they are material from an economic perspective. That is, the changes would not fundamentally alter the supply and demand balance or overall economic outcomes. I note the following differences to centres definitions between the Amendment and the SEES:

- The SEES included Gertrude Street NAC and the western section of Johnston Street NAC between Hoddle St and Smith Street as part of the Smith Street MAC. This area of Yarra is highly connected, with centres touching and effectively merging into each other. I do not see the definitions as proposed in the Amendment as being fundamentally different to that defined in the SEES
- The definition of Bridge Road in the SEES excluded Citizen Park and Richmond High School. In addition, the far east sub precinct north of Bridge Rd and between River St and the Yarra River was include in the Burnley Office Precinct instead of Bridge Road. I support the definition as defined in the Amendment and do not see it as being fundamentally different from that defined in the SEES from an economic perspective.
- The St George NAC excluded Fitzroy Primary School.
- In the SEES, Spensley Street and Berry Street/Ramsden Street Local Centre's were included within the Queens Parade NAC. In addition, Queens Parade did not include the Gasworks major redevelopment site. I support the Amendment separating out Spensley Street and Berry Street/Ramsden Street as Local Centre's distinct from the Queens Parade NAC.
- In the SEES the C1Z components of Rathdowne Village NAC was grouped with Lygon Street Local Centre and referred to as the 'Carlton' minor retail centres. Its designation was noted as a Local Activity Centre. The Rathdowne Local Centre was not included in the SEES as it did not contain employment zoned land. From an employment and economic

contribution perspective these centres play a relatively minor role within the City of Yarra's overall economy and changes to their role or designation would not fundamentally change the supply and demand balance of housing or employment. However, based on the current employment and economy role and function of the Rathdowne NAC I believe the Amendment designation is appropriate.

98. Given these minor differences, I believe, from an economic perspective the Housing Strategy and SEES and their associated analysis is consistent with the Amendment and they are suitable to include as background documents.

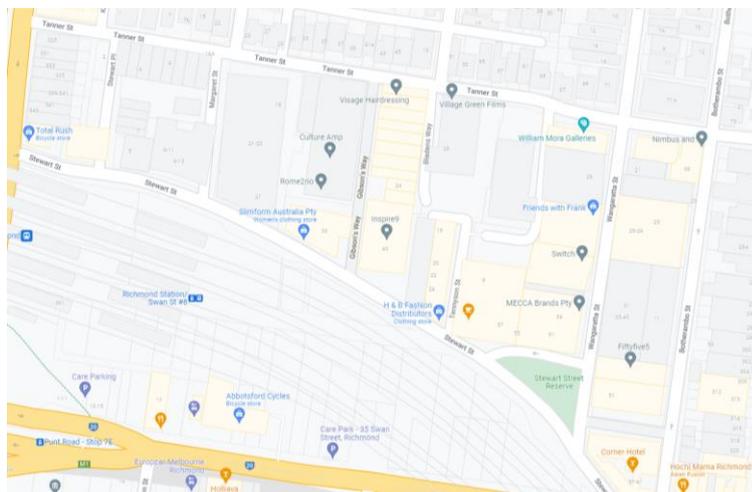
4. RESPONSE TO SUBMISSIONS

99. In response to Submissions, I provide the following comments in regard to the designation and boundary of selected Activity Centres.

Swan Street Major Activity Centre

100. Submitters 177, 196, 255, 266, 279, 297, 379, 387, 393, 396 and 411 have raised concerns regarding the inclusion of the Mixed Used Zoned area north of Richmond Station being included within the Swan Street Major Activity Centre boundary.
101. This precinct currently contains a diverse mix of uses including; small townhouses, newer apartments, retail, hospitality and commercial office premises (see Figure 8 below). It is directly adjacent to Richmond station, which provides excellent transport connectivity. The SEES included this sub precinct within the Swan St centre boundary and the Housing Strategy has identified it as an area for Moderate change.
102. Given this, I believe it is appropriate to include the area within the Swan Street activity centre boundary from an economic perspective in terms of its role, function and economic performance and assuming relevant concerns regarding the appropriate scale of development and preservation of heritage and character can be managed similar to other parts of designated Activity Centres. However, in saying this, if there are other (non-economic) reason for this area to be excluded, I do not believe that would fundamentally alter supply and demand balance of housing and employment.

FIGURE 8 GOOGLE MAPS EXTRACT OF SWAN STREET MIXED USE AREA



Source: Google maps, August 2021

Other centres and employment precincts

103. A number of other submitters raise concerns related to lower order centre designations and/or minor boundary changes. While these issues may be important to submitters, they generally do not have a significant impact on overall housing and employment outcomes from a broader economic perspective. As such, I will refer these matters to other experts, while provide the following commentary from my economic perspective:

Centre/submitter concern	Economic response
<p>Rathdowne Street Submitter 231 opposes NAC designation due to subsequent decreased viability of small businesses. Recommends it should be a local centre. Submitter also recommends the centre should be redesignated from 'incremental change' to 'minimal change'</p>	<p>As discussed at paragraph 97, I believe the NAC designation is appropriate from an economic perspective in terms of its role, function and economic performance. Further I don't believe that designation would negatively impact small businesses in the centre. Rather it should further enhance them over time. Given this, I also believe the designation of 'incremental change' has contained in the Housing Strategy is also appropriate.</p>
<p>Nicholson Street Submitter 231 opposes NAC designation due to possible huge over development of Bus Site. Recommends it should be a local centre. Submitter also recommends the centre should be redesignated from 'incremental change' to 'minimal change'</p>	<p>I believe the NAC designation is appropriate from an economic perspective, in terms of its role, function and economic performance and I believe concerns regarding the over development of the bus site can be managed through other planning controls. I also believe the designation of 'incremental change' is appropriate and consistent with the centres role and its level of access to transport, employment and services.</p>
<p>Queens Parade A submitter has concerns regarding the boundary of the centre and inclusion of Mayors Park.</p>	<p>From an economic perspective I believe the proposed boundary and housing framework designation is appropriate. The centre boundary should include land that is the focus of employment uses, residential growth and supporting community, open space and transport.</p>
<p>Heidelberg Road Submitter 328 has concerns around the area south of Heidelberg Road between Parkview Rd and Como St being designated as a NAC and moderate change area in the Housing Strategy</p>	<p>I believe the proposed boundary and designation is appropriate given the existing uses, future development proposed at the Paper Mill site and the areas proximity to transport services.</p>
<p>Cremorne Submitter 324 refers to the SEES discussion around the future of Cremorne and Gipps St and suggests the word 'consolidate' should be deleted in Clause 17.01-1L</p>	<p>As proposed in the Panel version, I would support the removal of the word 'consolidate' from the policy as the fine gain nature of the precinct should be retained to support a diverse and creative local economy.</p>

Other concerns from submitters

104. I have also reviewed other submissions referred to me and in this section of my evidence statement, I provide comments on those submissions (by topic) which I judge to be relevant

and within the scope of my expertise. Where appropriate, I have also made reference to earlier sections of my statement

Submitter concern	Economic response
<p>High vacancies S1 – ‘ongoing concern, relates to the number of retail street level premises which remain empty and are in derelict conditions</p>	<p>A successful activity centre should anticipate a base level of vacancy of around 5-10 per cent to enable churn and growth. The Amendment seeks to focus residential and employment demand into activity centres to support reinvestment and ensure vibrant and activity centres are created.</p>
<p>Diversity of shops S27 – ‘would love to see more diverse shops along Queens Parade’ Also see similar concerns from submitter numbers S103, S140, S146, S148, S224, S252, S323, S329, 372</p>	<p>Government and this Amendment can provide the enabling ingredients to support a diversity of uses (i.e. appropriate zoning, public realm, infrastructure). However, it is the market and individuals who ultimately determine what shops are built.</p>
<p>Reduce demand from COVID/other shocks S29 – Concerns overdevelopment will lead to high vacancy rates, especially during economic downturn Also see similar concerns from submitter numbers S37, S154, S161, S249, S350</p>	<p>I have discussed the potential short and lasting impacts of COVID and implications on the Amendment at paragraphs 45-50 and 79-85</p>
<p>Population growth and infrastructure S10 – ‘There are too much densification of housing already and no further need for more’ Also see similar concerns from submitter numbers S39 S46 S58, S146, S190, S204, S224, S354</p>	<p>I believe as Greater Melbourne continues to grow, it is important to provide continued opportunities for housing in highly accessible locations to support affordability, equity and diversity in communities. The level of growth planned in the Amendment is consistent with demand and past levels of growth as discussed in section 3.2 of statement. This population growth has also been fundamental in supporting the vibrant array of shops, restaurants and existing high quality parks, transport and other infrastructure.</p>
<p>Activity Centre Designations S285 – Activity Centres clauses merge the different activity centres, ignore their different roles Also see similar concerns from submitter numbers S384</p>	<p>Given the dense and mixed used nature of Yarra’ many Centres do overlap with each other. I believe the Amendment has sought to clearly define the hierarchy in so far as possible within this context.</p>
<p>Housing change areas S420 – ‘strongly opposes the ‘mid-rise’ or ‘moderate change’ growth classification for their site and submits it should be reasonably anticipated for ‘high change’ given the main road frontage, proximity to higher order activity centres, public transport and bicycle infrastructure, and significant separation from Yarra’s low scale, sensitive, historically significant residential neighbourhoods’ Also see similar concerns from submitter numbers S95, S190, S231, S292, S312, S315, S328, S330, S344, S381, S409, S416, S420, S424, S429</p>	<p>Adjustments to the housing change area designation of specific sites or individual parcels of land would not significantly impact Yarra’s overall housing supply and demand composition and are immaterial in terms of their overall economic outcomes.</p>

ATTACHMENT A - CV

Julian Szafraniec

Principal, Partner and Director

National Leader: Data and Spatial Analytics



105. Julian is an urban economist who has experience in applying economic theories and models to urban and regional issues across Australia and internationally. Julian has provided advice to all tiers of government and the private sector, related to the dynamics of housing, transport, community infrastructure, retail, and the economy generally.
106. Julian is an excellent communicator and able to translate often complex ideas into *plain English*. He regularly presents to councilors, the community, at conferences, seminars, panels hearings and has been reported in the media around key economic and housing issues.
107. I have previously presented expert evidence at Planning Panels Victoria and other hearings, including:
- (Am C258) Casey Activity Centre Strategy – City of Casey (2020)
 - (Am C393) Geelong Retail Strategy – City of Greater Geelong (2019)
 - (Am C309) West Melbourne Economic and Employment Study – City of Melbourne (2019)
 - (Am C126) Bayside Small Activity Centre Strategy – City of Bayside (2018)
 - (VCAT) Officer Hotel EGM application – City of Cardinia (2018)
 - (Am C150) Bayside RCE Strategy – City of Bayside (2018)
 - (Am GC81) Fishermans Bend Planning Review Panel – Economic Expert Evidence (2018)
 - (VCGLR hearing) Officer Hotel EGM application – City of Cardinia (2018)
 - (VCAT) Commercial Hotel EGM application – City of Whittlesea (2017)
 - (Am C76) Moorabool Industrial Land Supply Expert Evidence – City of Moorabool (2017)
 - (VCGLR hearing) Commercial Hotel EGM application – City of Whittlesea (2016)
 - (Am C182) Dandenong Housing Strategy - City of Greater Dandenong (2016)
 - Ministerial Advisory Committee - Housing Capacity - City of Boroondara (2016)
 - (Am C198) Craigieburn North PSP - Metropolitan Planning Authority, City of Hume (2015)
 - (Am C108) VicTrack Rezoning to Retail Uses – VicTrack, Shire of Yarra Ranges (2012)
 - (Am C21) Council Gambling Policy - Benalla Rural City Council (2012)

108. A selection of other relevant experience includes:

- Housing Strategy Demographic Support – Glen Eira City Council (2021)
- Creamery Road Retail and Employment Study – City of Greater Geelong (2021)
- Population, Housing, Employment and floorspace forecasts – City of Melbourne (2021)
- South East Economic Context Report – Victorian Planning Authority (2020)
- Bayside Business District and Night Economy Study – City of Bayside (2019)
- Pakenham South Employment PSP: Economic Assessment – City of Cardinia (2019)
- Small Area Land Use Projections – Transport for Victoria (2008-2020)
- Monash Site Development Potential Study – Dexus (2018)
- Greater Geelong Retail Strategy - Data update - City of Greater Geelong (2018)
- Ravenhall Site employment scenario analysis – Dexus (2018)
- Melbourne Growth Area Plan – National Australia Bank (2018)
- West Melbourne Employment and Economic Study – City of Melbourne (2017)
- East Village employment study – Brix Property Group (2017)
- Small Activity Centre Strategy - Bayside City Council (2017)
- Cranbourne Town Centre Economic and Housing Assessments – City of Casey (2017)
- Retail and Other Commercial Floorspace Assessment – City of Casey (2017)
- Clyde Town Centre UDF Economic peer-review – City of Casey (2016)
- Fishermans Bend Economic and Employment Study - Fishermans Bend Taskforce (2016)
- Retail Hospitality and Expenditure Study (2016 Update) - City of Melbourne (2016)
- Clyde Town Centre Urban Design Framework Review - City of Casey (2016)
- Retail, Commercial and Industrial Strategy - Bayside City Council (2016)
- Employment and Visitation Forecasts - City of Port Phillip (2016)
- Greater Geelong Retail Strategy - City of Greater Geelong (2016)
- **Spatial Economic and Employment Strategy - City of Yarra (2015)**
- Peer Review of Amcor Site Redevelopment Plan - City of Yarra (2015)
- Review of Green Square and Southern Areas Retail Study - City of Sydney (2015)
- Restricted Retail Study Hume-Whittlesea Corridor - Victorian Planning Authority (2014)
- Darebin Retail Strategy - City of Darebin (2014)
- Retail and Hospitality Expenditure Study - City of Melbourne (2013)
- Value of Hospitality Sector - City of Melbourne (2013)
- Chapel Re-vision development projects and employment capacity update - City of Stonnington (2014)

ATTACHMENT B – BRIEF TO EXPERT

Separately attached.

**AMENDMENT C269yara TO THE YARRA PLANNING SCHEME
IN PLANNING PANELS VICTORIA**

YARRA CITY COUNCIL

Planning Authority

MEMORANDUM TO EXPERT – ECONOMICS

INTRODUCTION

1. We act for Yarra City Council (**Council**).
2. Council has prepared Amendment C269yara (**Amendment**) to the Yarra Planning Scheme (**Scheme**), which proposes to update Council's local policies in the Scheme by replacing the Municipal Strategic Statement (**MSS**) at clause 21 and local planning policies at clause 22 of the Scheme with a Municipal Planning Strategy (**MPS**) and local policies within the Planning Policy Framework (**PPF**), consistent with the structure introduced by Amendment VC148.
3. More specifically, the Amendment:
 - 3.1 introduces a new MPS at clause 02.00 of the Scheme;
 - 3.2 introduces new and revised local policy content into the PPF at clauses 11-19;
 - 3.3 replaces the schedule to clause 52.06 (Gaming) with a new schedule that includes content previously contained in clause 22.15 (Gaming) of the LPPF;
 - 3.4 replaces the schedule to clause 72.04 (Documents Incorporated in this Planning Scheme) with a new schedule that:
 - 3.4.1 includes an updated version of the *City of Yarra Heritage Review Appendix 8* (the name of which will be changed through Amendment C245yara to Database of Heritage Significant Areas); and
 - 3.4.2 includes a new document called '*Guidelines – Managing noise impacts in urban development, October 2019*' that supports clause 13.07-1L (Interfaces and amenity);
 - 3.5 introduces a new schedule to clause 72.08 (Background Documents) comprising a list of background documents that informed the revised content in the MPS and PPF; and
 - 3.6 introduces a new Schedule to clause 74.01 (Application of Zones, Overlays and Provisions) to provide an explanation of the relationship between the municipal objectives and strategies, and the Scheme controls on the use and development of land.

4. The Amendment was informed by the following key documents which will be included in the new schedule to clause 72.08 (Background Documents):
 - 4.1 *Activity Centres – Roles and Boundaries, City of Yarra* (October 2019);
 - 4.2 *Landmarks and Views Assessment, Ethos Urban* (October 2019);
 - 4.3 *Noise and Vibration Considerations Report, SLR Consulting Pty Ltd* (October 2019);
 - 4.4 *Residential Heritage Policy Review, Context* (31 October 2019); and
 - 4.5 *Yarra Industrial Heritage Policy, GJM Heritage* (1 October 2019).
5. The following strategies which have been previously adopted by Council will also be included in the new Schedule to clause 72.08 (Background Documents):
 - 5.1 *Yarra Housing Strategy, City of Yarra* (September 2018);
 - 5.2 *Yarra Spatial Economic and Employment Strategy, SGS Economics* (2018) (**SEES**); and
 - 5.3 *Building for Diversity – Yarra’s Social and Affordable Housing Strategy, Yarra City Council* (November 2019).
6. On 26 November 2019, Council resolved to request authorisation from the Minister for Planning to prepare and exhibit the Amendment.
7. The Amendment was exhibited between 20 August 2020 and 4 December 2020. In response to exhibition, Council received 429 submissions (including late submissions).
8. On 3 August 2021, Council considered the submissions and resolved to refer all submissions to a Planning Panel. Further to this, your brief contains copies of:
 - 8.1 the Council Meeting Agenda, Minutes and all attachments;
 - 8.2 a report to the CEO referring further late submissions to the Panel; and
 - 8.3 the ‘Panel version’ of the Amendment material, which will form the basis of Council’s position to the Panel (**Panel version**). Please note that the Panel version includes marked up copies of the relevant exhibited policies, consistent with Council’s resolution of 3 August 2021 (ie. as recommended by Council officers in Attachment 5 to the Council Meeting Agenda with further changes, consistent with Council’s resolution of 3 August 2021).
9. You are kindly instructed to:
 - 9.1 review the exhibited Amendment documentation, as well as the ‘Panel version’ documentation;
 - 9.2 prepare a statement of evidence and appear as an expert witness at the Panel Hearing, listed to commence on 4 October 2021 (pre-set dates). Your expert witness report should:
 - 9.2.1 be prepared in accordance with the *Guide to Expert Evidence*;

- 9.2.2 not refer to any submitter by name (please use submission numbers);
- 9.2.3 express your opinion on the Amendment insofar as it relates to your area of expertise. In particular, we ask that you consider the impact of both the exhibited Amendment documentation, as well as the 'Panel version' documentation on residential and commercial developments within the City of Yarra, including:
- identifying the projected demand for residential and commercial development within the City of Yarra (based on an up to date projection of at least 15 years);
 - whether, if approved, the exhibited or preferred versions of the Amendment would impact upon the realisation of housing growth rates within the City of Yarra, and if so, how;
 - whether, if approved, the exhibited or preferred versions of the Amendment would impact upon the realisation of commercial growth rates within the City of Yarra, and if so, how;
 - the impact of the COVID-19 pandemic on the assumptions in the Yarra Housing Strategy and SEES;
 - the impact of the COVID-19 pandemic on population growth, and the impact of that growth on housing projections for Yarra; and
- 9.2.4 express your opinion on the key issues, as relevant to your expertise, raised by submissions to the Amendment (see further comment on this below) and the Council position in respect of those matters.

AMENDMENT C269yara

Summary

10. The purpose of the Amendment is two-fold in that it:
- 10.1 revises and updates local planning policies in the Scheme by implementing the findings of the Yarra Planning Scheme Review undertaken in 2014 (**2014 Planning Scheme Review**) and other key pieces of strategic work undertaken since that time; and
- 10.2 facilitates the integration of Council's local policy into the PPF as required by Amendment VC148 and the Victorian Government's Smart Planning Program which seeks to simplify and modernise Victoria's planning policy, and to make planning schemes more efficient, accessible and transparent.
11. These elements of the Amendment are considered in further detail in the Officer's Report of 26 November 2019 seeking authorisation from the Minister to prepare the Amendment and in the Explanatory Report for the Amendment, included in your brief at **tabs 14 and 2** respectively.
12. For the purposes of this brief, we have only detailed those parts of the Amendment relevant to economic issues, and to your instructions.

Economics and Spatial Planning issues

13. In 2018, Council adopted the SEES.
14. The SEES was prepared to understand and capitalise on Yarra’s economic strengths as well as respond to key trends and economic drivers over the next 10 to 15 years. To this end, the SEES contains the following six strategic directions:
 - 14.1 support employment growth in Yarra’s Activity Centres;
 - 14.2 retain and grow Yarra’s major employment precincts;
 - 14.3 identify preferred locations for housing growth;
 - 14.4 support the expansion of health related employment and services in Yarra’s health precincts;
 - 14.5 retain other Commercial 2 zoned precincts and sites; and
 - 14.6 retain Yarra’s existing industrial precincts for manufacturing and urban services.
15. The Amendment articulates these strategic directions in:
 - 15.1 directions outlined in the MPS;
 - 15.2 the Strategic Framework Plan at clause 02.04;
 - 15.3 clauses:
 - 15.3.1 11.03-1L (Activity Centres);
 - 15.3.2 17.01-L (Employment);
 - 15.3.3 17.01-2L (Retail);
 - 15.3.4 17.04-1L (Tourism);
 - 15.3.5 19.02-1L (Health Precincts); and
 - 15.3.6 19.02-2L (Education Precincts).
16. These provisions, as relevant to the SEES, are outlined in further detail below.
 - 16.1 **Clause 02.03** identifies a number of directions giving effect to the strategic work undertaken in the SEES, including:
 - 16.1.1 Yarra’s network of activity centres, including major activity centres, neighbourhood activity centres and local activity centres which is articulated in the direction to *support and strengthen the vibrancy and local identity of Yarra’s network of activity centres*;
 - 16.1.2 economic development in Yarra, articulated in the direction recognising that Yarra is an *attractive location for economic activities and an important part of Melbourne’s inner city economy*;
 - 16.2 the Strategic Framework Plan at **Clause 02.04** identifies the major activity centres, neighbourhood activity centres and local activity centres within Yarra;

- 16.3 **11.03-1L (Activity Centres)** contains further detailed strategic guidance specific to each major, neighbourhood and local activity centre within Yarra;
 - 16.4 **17.01-L (Employment)** contains general strategies relating to employment within Yarra and identifies objectives and strategies for the Cremorne and Gipps Street major employment precincts;
 - 16.5 **17.01-2L (Retail)** contains general strategies relating to the development and use of retail premises within Yarra;
 - 16.6 **17.04-1L (Tourism)** seeks to promote Yarra as a pre-eminent tourism, arts and cultural destination in metropolitan Melbourne and employs strategies in pursuit of this objective;
 - 16.7 **19.02-1L (Health Precincts)** seeks to recognise and support Yarra's health precincts as recognised in the Strategic Framework Plan as the St Vincent's public and private hospitals and ACU Health and Education Precinct, and employs strategies in pursuit of this objective;
 - 16.8 **19.02-2L (Education Precincts)** similarly seeks to support Yarra's education precinct as identified in *Plan Melbourne*, and to recognise their specialised role and function in both Yarra and Metropolitan Melbourne.
- 17. The SEES is proposed to be included in the new Schedule to clause 72.08 (Background Documents).
 - 18. A copy of the SEES and the Clauses listed above are included in your brief.

Activity Centres

- 19. The *Activity Centres – Roles and Boundaries, City of Yarra* (October 2019) report (**Activity Centres Report**) was prepared by Council in 2019 to define the network of activity centres in the City of Yarra.
- 20. In particular, the Activity Centres Report assesses the policy context for the system of activity centres in the City of Yarra by reviewing the current planning scheme provisions and analysing the roles, extent and boundaries of all the City's activity centres.
- 21. In doing so, it:
 - 21.1 provides a rationale for the boundaries and role of major and neighbourhood activity centres and the smaller local centres; and
 - 21.2 includes clearer mapping of the activity centre boundaries and identifies the categories of precincts in each centre.
- 22. The methodology undertaken in the Activity Centres Report is based on Planning Practice Note 58 *Structure Planning for Activity Centres (PPN58)* including by responding to the criteria / issues to consider in determining the potential location of activity centre boundaries.
- 23. The Amendment implements a number of outcomes and findings of the Activity Centres Report in proposed clause 11.03-1L (Activity Centres). Activity centre policy is also found in proposed clause 02.01 (Context) and in the strategic framework plan proposed at clause 02.04-1 which are briefly summarised above at paragraph 16.
- 24. The Activity Centres Report is proposed to be included as a background document in the Schedule to clause 72.08 (Background Documents).

25. A copy of the Activity Centres Report is included in your brief.

Yarra Housing Strategy

26. The Yarra Housing Strategy (**YHS**) was adopted by Council on 4 September 2018 and has, to date, been used in a number of important planning scheme amendments for activity centres in Yarra.

27. Amendment C269yara proposes to introduce the YHS as a background document in clause 72.08 of the Scheme.

28. The purpose of the YHS is to prepare a housing growth framework that sets a preferred vision for Yarra over the next 15 years. Key objectives of the YHS include¹:

28.1 identify areas for housing growth and development, consistent with the strategic context and characteristics of Yarra’s neighbourhoods; and

28.2 provide a strategic approach to where and how Yarra guides and directs future growth.

29. The YHS seeks to provide²:

29.1 clear direction and guidance on the appropriate locations for growth;

29.2 a growth strategy that takes a holistic approach to housing growth beyond directing housing growth to designated Strategic Redevelopment Sites; and

29.3 certainty about the levels of growth in neighbourhoods and activity centres.

30. The YHS strategic housing framework plan visually identifies the level of growth anticipated across the municipality. Four housing change areas have been applied to the strategic housing framework plan based on a set of categories. The framework seeks to provide a clear policy framework for Yarra to guide and direct housing growth and in particular to provide certainty for land owners, developers and the community about the level of housing growth expected in each neighbourhood and activity centre. The framework also provides clarity over the areas that are most suitable for accommodating substantial residential growth over the next 15 years.

31. A copy of the Yarra Housing Strategy is included in your brief.

32. The key outcomes and directions of the Yarra Housing Strategy have been translated into the following policy documents, as part of Amendment C269yara:

32.1 Clause 02.01 – Context;

32.2 Clause 02.02 – Vision;

32.3 Clause 02.03 – Strategic directions;

32.4 Clause 02.04 – Strategic framework plan;

32.5 Clause 11.03-1L - Activity centres;

32.6 Clause 15.01-2L - Building design;

¹ YHS, page 8.

² YHS, page 25.

- 32.7 Clause 16.01-2L - Location of residential development;
- 32.8 Clause 16.01-3L - Housing diversity;
- 32.9 Clause 16.01-4L - Housing affordability;

Exhibition and submissions

- 33. The Amendment was exhibited between 20 August 2020 and 4 December 2020.
- 34. In response to exhibition, Council received 429 submissions.
- 35. A copy of all submissions are included in your brief. We will send you a separate email early next week outlining which of those submissions may be particularly relevant to your expertise.
- 36. Council considered the submissions and resolved to refer all submissions to an Independent Planning Panel on 3 August 2021.
- 37. The submissions raise a number of matters which we consider to be relevant to your expertise and will require your consideration. These include:
 - 37.1 In relation to Activity Centres:
 - 37.1.1 balancing tensions of introducing residential growth in and around activity centres versus the primary commercial and cultural roles of those activity centres (as highlighted by the Council resolution 1(f));
 - 37.1.2 Swan Street MAC boundary should not be extended to include Stewart, Hoddle, Tanner and Wangaratta Streets (including the Australian Knitting Mills complex);
 - 37.1.3 does not support inclusion of Berry/Ramsden Street, Clifton Hill and Spensley Street, Clifton Hill within the Local Activity Centres;
 - 37.1.4 does not support the inclusion of the site at 582 Heidelberg Road, Alphington in the Alphington Activity Centre;
 - 37.1.5 the need for viable shop spaces to be retained;
 - 37.1.6 designation of activity centres in the hierarchy of major, neighbourhood and local activity centres, including:
 - several submissions which object to the designation of Rathdowne Street, Carlton North as a Neighbourhood Activity Centre as identified in Clause 11.03-1L Activity Centres and its identification for incremental change; and
 - whether preserving neighbourhood activity centres with heritage streetscapes will encourage economic viability;
 - 37.2 in relation to location of residential development:
 - 37.2.1 there is too much densification of housing and no further need for more;
 - 37.2.2 there is potential to undermine State Policy that directs more intense development outcomes in Activity Centres;

- 37.2.3 residential development should not be in local shopping strips, or if there is some residential development, it should not be at the expense of the ongoing viability, diversity and heritage of local shops. Industrial spaces would be more sustainable and a better option for residential development as they have less impact on shops and residential homes;
 - 37.2.4 requests for reclassification (in relation to housing change areas);
 - 37.2.5 whether over development leaves urban environments vulnerable to economic downturn (resulting in high vacancy, poor maintenance and long-term urban decay).
- 37.3 in relation to economic development:
- 37.3.1 (Cremorne – Site amalgamation) Clause 17.01-1L be amended by deleting the word ‘consolidation’ from the strategy *‘encourage the consolidation and intensification of employment land within Yarra’s major employment precincts’*;
 - 37.3.2 day/night diversity of shops and activities should include use above ground floor for additional shops, libraries, studios, residences etc.;
 - 37.3.3 there needs to be a focus on maintaining the arts culture and diverse art activities need to be supported (for example the Gertrude Street Projection Festival);
 - 37.3.4 there appears to be no current requirement for commercial landowners to maintain their premises in a fit state when unoccupied for periods of time.
38. You will note having regard to the Council Meeting Agenda of 3 August 2021, that a number of revisions to the exhibited Amendment and background material are proposed to be taken to the Panel for the purposes of Council’s position at the hearing in October. This includes the changes shown in Attachment 5 to the Council Meeting Agenda, in response to submissions, as well the further changes identified in paragraph 1(e) as resolved by Council on 3 August 2021 (collectively shown in the “Panel version” of the material).

Planning Panel

39. Planning Panels Victoria has provided the following pre-set panel hearing dates:
- 39.1 Directions hearing – 27 August 2021.
 - 39.2 Panel hearing – commencing 4 October 2021 and expected to run for approximately 3 weeks.

YOUR INSTRUCTIONS

40. You are kindly instructed to:
- 40.1 review the exhibited Amendment documentation, as well as the ‘Panel version’ documentation;
 - 40.2 prepare a statement of evidence and appear as an expert witness at the Panel Hearing, listed to commence on 4 October 2021 (pre-set dates). Your expert witness report should:
 - 40.2.1 be prepared in accordance with the *Guide to Expert Evidence*;

- 40.2.2 not refer to any submitter by name (please use submission number);
- 40.2.3 express your opinion on the Amendment insofar as it relates to your area of expertise. In particular, we ask that you consider the impact of both the exhibited Amendment documentation, as well as the 'Panel version' documentation on residential and commercial developments within the City of Yarra, including:
- identifying the projected demand for residential and commercial development within the City of Yarra (based on an up to date projection of at least 15 years);
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 - whether, if approved, the exhibited or preferred versions of the Amendment would impact upon the realisation of commercial growth rates within the City of Yarra, and if so, how;
 - the impact of the COVID-19 pandemic on the assumptions in the Yarra Housing Strategy and SEES;
 - the impact of the COVID-19 pandemic on population growth, and the impact of that growth on housing projections for Yarra;
- 40.2.4 express your opinion on the key issues, as relevant to your expertise, raised by submissions to the Amendment (see further comment on this below) and the Council position in respect of those matters.

Fee proposal

41. Before starting any work, we kindly request you provide us with an electronic copy of your fee proposal for the above scope of works, for Council's consideration.
42. Please also provide a schedule of fees and rates in the event that you are required to perform additional tasks in the future relating to this matter.
43. If your fee proposal is approved, all accounts for this matter should be referred directly to Maddocks (marked to the attention of Briana Eastaugh/Kristin Richardson).

Maintaining client legal privilege and confidentiality

44. The advice you are being asked to provide may be relied upon for any future hearing or litigation and for the purposes of providing legal advice to our client. You must as far as legally possible treat all communications relating to the scope of works as confidential and subject to client legal privilege.

Other matters

45. Please find enclosed an indexed brief of documents. Kindly let us know if you require any further information or documentation.



Maddocks

47. Please contact Briana Eastaugh on 9258 3372 or Kristin Richardson on 9258 3558 should you have any queries.

Dated: 20 August 2021

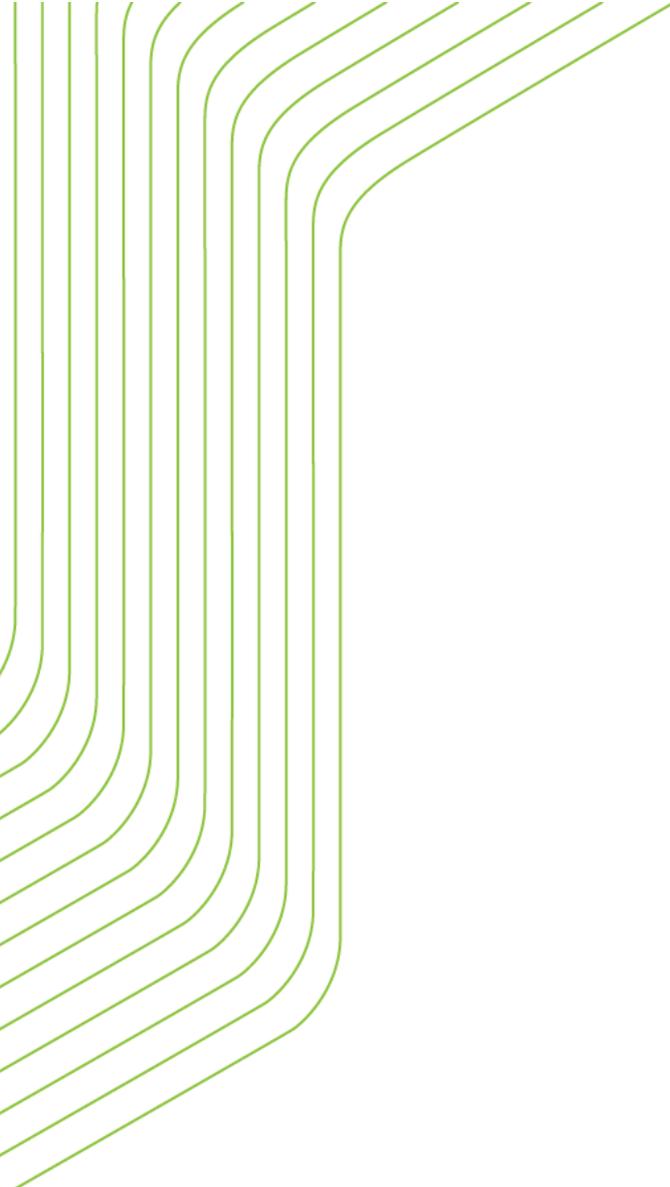
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TAB NO	DESCRIPTION OF DOCUMENT	DATE
RELEVANT AMENDMENT C269yara DOCUMENTATION (as exhibited)		
1.	Notice of Preparation of an Amendment	
2.	Explanatory Report	
3.	Instruction Sheet	
4.	Clause 02.03 – Strategic Directions	
5.	Clause 02.04 – Strategic Framework Plan	
6.	Clause 11.03-1L – Activity Centres	
7.	Clause 17.01-1L – Employment	
8.	Clause 17.02-1L – Retail	
9.	Clause 17.04-1L – Tourism	
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12.	Schedule to clause 72.08 – Background Documents	
STRATEGIC DOCUMENTS & BACKGROUND REPORTS		
13.	<i>Yarra Spatial Economic and Employment Strategy</i> , SGS Economics	2018
14.	<i>Activity Centres – Roles and Boundaries</i> , City of Yarra	October 2019
15.	<i>Yarra Housing Strategy</i>	2018
SUBMISSIONS		
16.	Submissions	
COUNCIL REPORTS		
17.	Ordinary Meeting of Council – Minutes and Agenda (containing Officer Report)	3 August 2021
OTHER		
18.	'Panel preferred' version of relevant Amendment documentation, including changes proposed by Council Officers in response to submissions and having regard to Council resolution of 3 August 2021	
19.	<i>Planning Panels Guide to Expert Evidence</i>	



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