

MELBOURNE AIRPORT RAIL

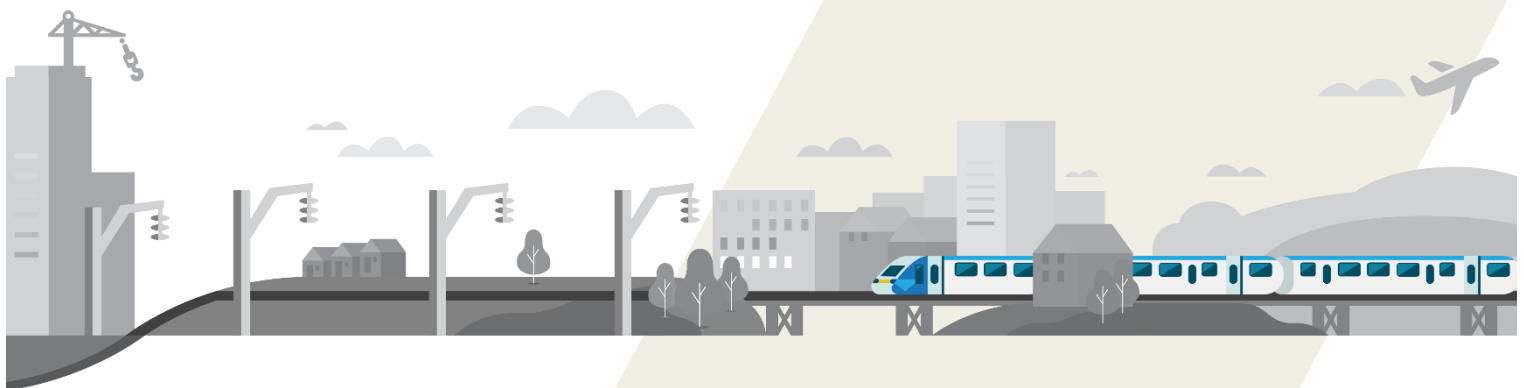
MAR STATE LAND BUSINESS IMPACT ASSESSMENT

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This document should be read in full and no excerpts are to be taken as representative of the findings.

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Table of Abbreviations

Table 1.1 Table of Abbreviations

Abbreviation	Definition
AJM-JV	Aurecon Jacobs Mott Macdonald Joint Venture
ARTC	Australian Rail Track Corporation
BCC	Brimbank City Council
BDP	Business Disruption Plan
CBD	Central Business District
COR	Corridor Section
CSR	Combined services route
DJPR	Department of Jobs, Precincts and Regions
DOT	Department of Transport
DTRS	Digital Train Radio System
FTE	Full-Time Equivalent (job)
GDP	Gross Domestic Product
GRP	Gross Regional Product
HV	High voltage
ITP	Integrated Transport Plan
LASSI	Land and Survey Spatial Information
LGA	Local Government Area
MAR	Melbourne Airport Rail
NEIC	National Employment and Innovation Cluster
OHLE	Overhead line equipment
PAO	Public Acquisition Overlay
RPV	Rail Projects Victoria
RRL	Regional Rail Link
SA2	Statistical Local Area 2 (Australian Bureau of Statistics – Statistical Geography Information level)
SCC	Strategic Cycling Corridor
SUN	Sunshine Section
SUP	Shared use path
WMT	Western Melbourne Tourism
WoMEDA	West of Melbourne Economic Development Alliance
WRP	Western Rail Plan

1. Executive Summary

Aurecon Jacobs Mott Macdonald Joint Venture (AJM-JV) has been engaged by Rail Projects Victoria (RPV) to prepare the Melbourne Airport Rail (MAR) State Land Business Impact Assessment (the Impact Assessment). The purpose of the Impact Assessment is to provide context and analyse the potential impacts of the proposed works on businesses, as well as recommending mitigation measures a.

The MAR project (the Project) is a once-in-a-generation transformation of Victoria's transport network, connecting Melbourne Airport's Integrated Terminal Precinct with a rail service for the first time. In 2018, the Victorian Government released the Melbourne Airport Rail Link Sunshine Route Strategic Appraisal (Transport for Victoria, 2018), which confirmed that the Sunshine route remains the best solution for an airport rail link. The Sunshine route would provide superior connections to regional Victoria, Melbourne's growth areas in the north and west and Melbourne's south eastern suburbs and could be delivered sooner and at a significantly lower cost than other route options.

Review of relevant specialist reports

There are a number of specialist reports that are relevant to the Impact Assessment that have been drawn upon for complementary analysis. These include:

- **Melbourne Airport Rail Integrated Transport Plan:** Accommodation of increased rail passenger demand is necessary to support development of businesses around Albion and Sunshine. This extends beyond the provision of train and station capacity to all aspects of the journey. Improvements to existing transport links as well as the introduction of the Project will make the area more attractive for development.
- **MAR State Land Use Planning Assessment:** Sunshine and Albion have been identified at both the state and local level for future urban renewal and intensification. There are a number of businesses within the Project Land which face negative impacts. While stakeholder engagement has commenced, further engagement is recommended with the owners or occupiers of sites in the construction laydown area to confirm the feasibility of temporary occupation. There are also several strategic redevelopment sites, subject to current planning permit activity, that are proposed for temporary occupation. Engagement with the developers has commenced and will continue as part of ongoing stakeholder engagement.

These reports emphasise the planned urban renewal in key precincts affected by the Project and the role of major infrastructure projects in realising this renewal.

Existing conditions

Analysis was undertaken using Australian Bureau of Statistics (ABS) data, community profiles and Small Area Labour Market statistics to determine the characteristics of the regional economy in its present state.

- The top four industries within the affected Statistical Local Area 2 (SA2) encompassing the Albion, Keilor and Sunshine areas include manufacturing, transport, postal & warehousing, construction and health care and social assistance. These industries employ around half of the labour force in the area.
- Around 97% of the businesses operating in the area employ less than 20 people. The businesses that employ more than 20 people are largely in the manufacturing industry.
- Tourism has been identified as an area for possible growth and with the potential to gain benefits from infrastructure that supports tourism. For an airport rail connection, these benefits are likely to be localised around stations.

Impact Assessment

An assessment of the businesses impacted by the Project was undertaken to analyse the risks and opportunities of locating the works in the proposed locations. This assessment was based on a desktop analysis and no direct engagement with businesses has been undertaken to inform this report.


The key findings include:

- **Temporary impacts:** Approximately eight businesses within the areas identified for temporary works are expected to be impacted during the construction phase of the Project. Some businesses may experience a loss of revenue over 30%, and in some cases, may not be able to operate during the construction phase which would lead to the business either relocating or closing.
- **Access impacts:** Approximately two businesses within the areas identified for access restrictions are expected to experience revenue losses to some extent, depending on the level of restriction.
- **Permanent impacts:** An estimated 16 businesses within the areas identified for permanent works will need to relocate, resulting in jobs being lost or moved to a different area. Fifteen of the businesses are within the PAO area, where acquisition of these properties has been anticipated for over a decade, while one business is outside of the PAO and therefore of higher concern.

If **all** workers employed at businesses impacted by permanent works were to lose their jobs, the total direct employment impact would be up to 232 Full-Time Equivalent (FTE) employees. In addition, there would be flow on (or indirect) employment impacts resulting in approximately 370 additional employees losing their jobs. However, if the businesses with 25 or less employees can be re-established in another location, the direct employment impact would be up to 118 FTE employees, and there would be an indirect impact of 181 employees. In addition, there may be agglomeration impacts as a result of businesses relocating out of the area.

- **Access to compensation:** Where a land is temporarily occupied or permanently acquired by the State for the purposes of the Project, there is a legislative compensation regime that provides the ability to claim compensation for business disruption (amongst other matters) as a natural, direct and reasonable consequence of the occupation or acquisition of land.
- **Indirect business impacts:** Some businesses land will not be directly affected by the Project, but they may experience similar impacts that cause a loss of business revenue. These impacts may include road network changes, noise, amenity impacts, utility disruptions or roadblocks, or more permanently, parking limitations. The impacts will be managed in accordance with the Project's Environmental Management Framework (EMF) and Environmental Management Requirements (EMRs).
- **Development site impacts:** The project works near [REDACTED] may result in less business tenant interest to fill the development or result in businesses who have recently opened to experience revenue losses. Considerations should also be made for construction coordination including access, noise and amenity impacts, particularly for the development sites that will be under development during the same period as the Project. These impacts will be managed in accordance with the Project's EMF and EMRs.
- **Opportunities:** Assuming most employees will be sourced from the Melbourne area, the construction of the Project will generate employment for the region. Assuming a total construction cost of \$4.75 billion for the Project on State Land only¹, there will be around \$12.80 billion output generated during construction. Across the entire economy, a person-year of FTE employment is generated for every \$37k of initial investment in construction; thus, approximately 128,250 person-years of FTE employment will be created. There will also be long term positive impacts on the economy as increased investment in the area occurs.
- **Environment Effects Act 1978 (EE Act) Referral Self-Assessment:** This Impact Assessment finds that the effects on economic well-being from direct and indirect displacement of non-residential land use activities are not of regional or State significance as:
 - > The majority of business to be impacted in Keilor Park and Tullamarine are already affected by a Public Acquisition Overlay (PAO) associated with a previous iteration of the Project, signalling a clear intent for these land parcels to be acquired for the purposes of a rail link to the Airport.
 - > Business impacted by temporary or permanent works and displaced as a result of project works will have access to a statutory compensation regime that provides the ability to claim compensation for

¹ Midpoint of estimate range provided by MTIA



business disruption (amongst other matters) as a natural, direct and reasonable consequence of the occupation or acquisition of land

- > While businesses may be impacted during the construction period, where possible sites will be reinstated at the completion of works and any residual impacts will be managed in accordance with the EMF and EMRs. Businesses impacted by temporary or permanent works and displaced as a result of project works will have access to a statutory compensation regime that provides the ability to claim compensation for business disruption (amongst other matters) as a natural, direct and reasonable consequence of the occupation or acquisition of land.
- > Ongoing impacts on business during MAR operations are assessed to be negligible.

Mitigations

To mitigate the impacts of temporary construction works, while stakeholder engagement has commenced, further engagement should be undertaken to establish whether the impacts are critical to business operations. The Project should liaise with potentially affected businesses to reduce any loss of business revenue caused by access restrictions. Where possible, sites occupied by existing businesses have been avoided for construction works.

Businesses will be able to make a claim for compensation of they have land that has been temporarily occupied or acquired in accordance with the *Major Transport Projects Facilitation Act 2009 (MTPFA)* and the *Land Acquisition and Compensation Act 1986 (LACA)*. As above, where possible, sites occupied by existing businesses have been avoided for permanent works.

Mitigations will be implemented through a Business Disruption Plan (BDP) formalised through the EMF, prepared and approved in accordance with the relevant planning approval. The BDP will document the means by which the contractor will manage potential impacts to non-acquired businesses, commercial property owners and not-for-profit organisations as well as ensure appropriate engagement with local councils, businesses, property owners and the community throughout construction.

The provisions of the BDP will be informed by relevant factors including the outcomes of RPV stakeholder engagement, the final project footprint, and the recommendations of the Business Impact Assessment. These are likely to include maintenance of access (or provision of alternative access) during temporary occupation, and appropriate notice to businesses before works commence.

Stakeholder Engagement

A stakeholder engagement process would help to confirm the identity of businesses and the potential Project impacts, including any loss of revenue or footfall or need to permanently relocate. Stakeholders that have been identified based on the findings from the regional economy baseline, relevant specialist reports and the impact assessment include Brimbank City Council, City of Moonee Valley, Sunshine Business Association Western Melbourne Tourism (WMT), LeadWest Special Committee and business owners in the Project Land.

The RPV communications and stakeholder engagement team are responsible for carrying out this engagement. Initial consultation was limited to individual businesses identified as being within the PAO, an area of land that was set aside for a future rail link to Melbourne Airport in 2005. Engagement has since commenced with landowners and tenants outside the PAO land area. It is recommended that the outcomes of any further engagement are incorporated into the management approach for affected parties through the BDP or other relevant plans.

2. Introduction

Aurecon Jacobs Mott Macdonald Joint Venture (AJM-JV) has been engaged by Rail Projects Victoria (RPV) to prepare the Melbourne Airport Rail (MAR) State Land Business Impact Assessment (the Impact Assessment).

2.1 Purpose

The purpose of the Impact Assessment includes the following:

- Identify key economic trends, policies and existing business conditions within the State Project Land
- Assess the potential business impacts and opportunities
- Identify and propose mitigation or performance requirements
- Develop a stakeholder list for future discussions about business impacts, opportunities and mitigation

2.2 Methodology

The preparation of the Impact Assessment has been undertaken based on a desktop analysis and included the following:

- Review of the scope of works and mapping presented in the 'MAR Project Description for Environmental Specialists' (MAR-AJM-PWD-PWD-MEM-XLP-NAP-0001505, Revision C) (the Project Description).
- Determine the regional economy baseline including population, employment and economic statistics for the affected project areas. Compile data from online resources including ABS, Profile ID and Small Area Labour Market statistics to determine the characteristics of the regional economy in its present state.
- Review of relevant specialist reports for information, including MAR State Land Use Planning Assessment, the MAR Integrated Transport Plan and the MAR State Land Traffic and Transport Assessment.
- Identify businesses impacted using a combination of project maps, Google Maps and Land and Survey Spatial Information (LASSI).
 - > Project maps are used to identify the land affected
 - > LASSI is used to identify the address of the property and measure the total land area (as well as to measure the estimated floorspace of the buildings affected by permanent works)
 - > Google Maps is used to assess the likely business name and industry of work

Note: Stakeholder engagement is recommended to confirm the nature of the business and appropriate mitigations for potential impacts.

- Assess the business impact and proposed mitigation measures including temporary, access and permanent impacts and opportunities.
 - > Temporary and access impacts: identify which businesses may have temporary works, occupation or access restrictions that critically impact their business operations and assess what these impacts may look like. Suggest measures to eliminate or reduce the impacts.
 - > Permanent impacts: identify which of the businesses will have permanent works that critically impact their business operations and assess the likely impact to these businesses. Apply industry benchmarks (Appendix C) to land size and industry of businesses to estimate the Full Time Equivalent (FTE) employment impact if permanent works result in relocation or closure of businesses. Multiply the direct employment figures by a production and consumption induced effect multiplier (from ABS Input-Output data, Appendix C) to estimate the impact on the supply chain around the Project.

- > Opportunities: estimate the value on the economy based on \$4.75 billion construction cost. Apply ABS Input-Output data (Appendix C) to construction costs to analyse the employment and output impact.
- Develop a stakeholder list for discussions about business impacts, opportunities and mitigation based on the findings from the regional economy baseline, relevant specialist report and impact assessment.

2.3 Assumptions and Limitations

The following assumptions and limitations apply to the Impact Assessment:

- The Impact Assessment relates only to public and privately owned State Land and does not consider Commonwealth-owned land, as Commonwealth Land is not subject to Victoria's legislative framework. Impact Assessments associated with Commonwealth Land, specifically land at Melbourne Airport, will form part of a separate suite of impact assessments.
- The Impact Assessment is based on the scope of works detailed in the Project Description and State Project Land derived from MAR 'Project Land' Revision A.7 (MAR-AJM-PWD-PWD-MAP-XLP-MMN-0111172).
- This Impact Assessment is based on desktop assessment and analysis only. No direct engagement with businesses has been undertaken to inform this assessment.
- The business profile is informed by secondary research (publicly available data, estimates from floorspace etc.) only. The profile should be updated following primary research (consultation with key stakeholders).
- The employment analysis industry composition considers the whole SA2 or LGA area, some of which may not be relevant to the Project.
- The reliance on the mapping information available presents a limitation as information may be unreliable or outdated and the allocation of industries are based on speculation only.
- The Impact Assessment is based on ABS Input-Output multipliers from 1999 and therefore likely represents some outdated information. This is a standard limitation for input-output analysis of Australian projects, as this is the last year of publication of an official resource. Any change in the multipliers is not material to the Project.

3. Background

3.1 Strategic Context

The MAR project (the Project) is a once-in-a-generation transformation of Victoria's transport network, connecting Melbourne Airport's Integrated Terminal Precinct with a rail service for the first time.

Melbourne Airport handled more than 37 million passenger movements in 2018-19² and by 2038, this figure is projected to almost double to more than 67 million³, which is an average growth of 3.2% per annum. Transport connectivity from Melbourne Airport to Melbourne's Central Business District (CBD) is currently limited to the Tullamarine Freeway, and therefore, the Victorian Government is committed to delivering an efficient, competitive alternative to cater for the ongoing increase in passenger numbers at Melbourne Airport.

In 2002, the Victorian Government considered possible corridor and alignment options for a Melbourne Airport Rail Link, ultimately selecting the Sunshine route as the preferred option. At this time, land was reserved between the Albion-Jacana rail corridor and extending through to Sharps Road, Tullamarine for the construction of a rail link.

In 2018, the Victorian Government released the Melbourne Airport Rail Link Sunshine Route Strategic Appraisal, which confirmed that the Sunshine route remains the best solution for an airport rail link. The Sunshine route would provide superior connections to regional Victoria, Melbourne's growth areas in the north and west and Melbourne's south eastern suburbs and could be delivered sooner and at a significantly lower cost than other route options.

3.2 State Project Land

The State Project Land defines the land within which the Project components and construction activities are planned to be contained. It sets out the full extent of land identified as potentially required for the delivery of the Project.

The Project Land encompasses all State Land areas that would be used for permanent structures and temporary construction areas. It provides the basis for and informs the Impact Assessment.

Project Land relevant to State-based approvals generally includes:

- Land between Sharps Road and the Albion-Jacana rail corridor, including land crossing the M80 Freeway
- The existing Albion-Jacana rail corridor generally between Jacana and Albion Stations
- Land around Sunshine and Albion Stations, including the existing rail corridor
- Land required for the Project from Jacana Station in the north-east to Newport Station in the south-west and Middle Footscray Station in the east. This largely includes the Albion-Jacana rail corridor via Sunshine and Albion stations and land required for a new rail corridor between Sharps Road and the Albion-Jacana rail corridor.

The extent of the State Project Land is shown in Figure 3.1.

² https://www.bitre.gov.au/publications/ongoing/airport_traffic_data

³ <https://www.melbourneairport.com.au/Corporate/Planning-projects/Master-plan>

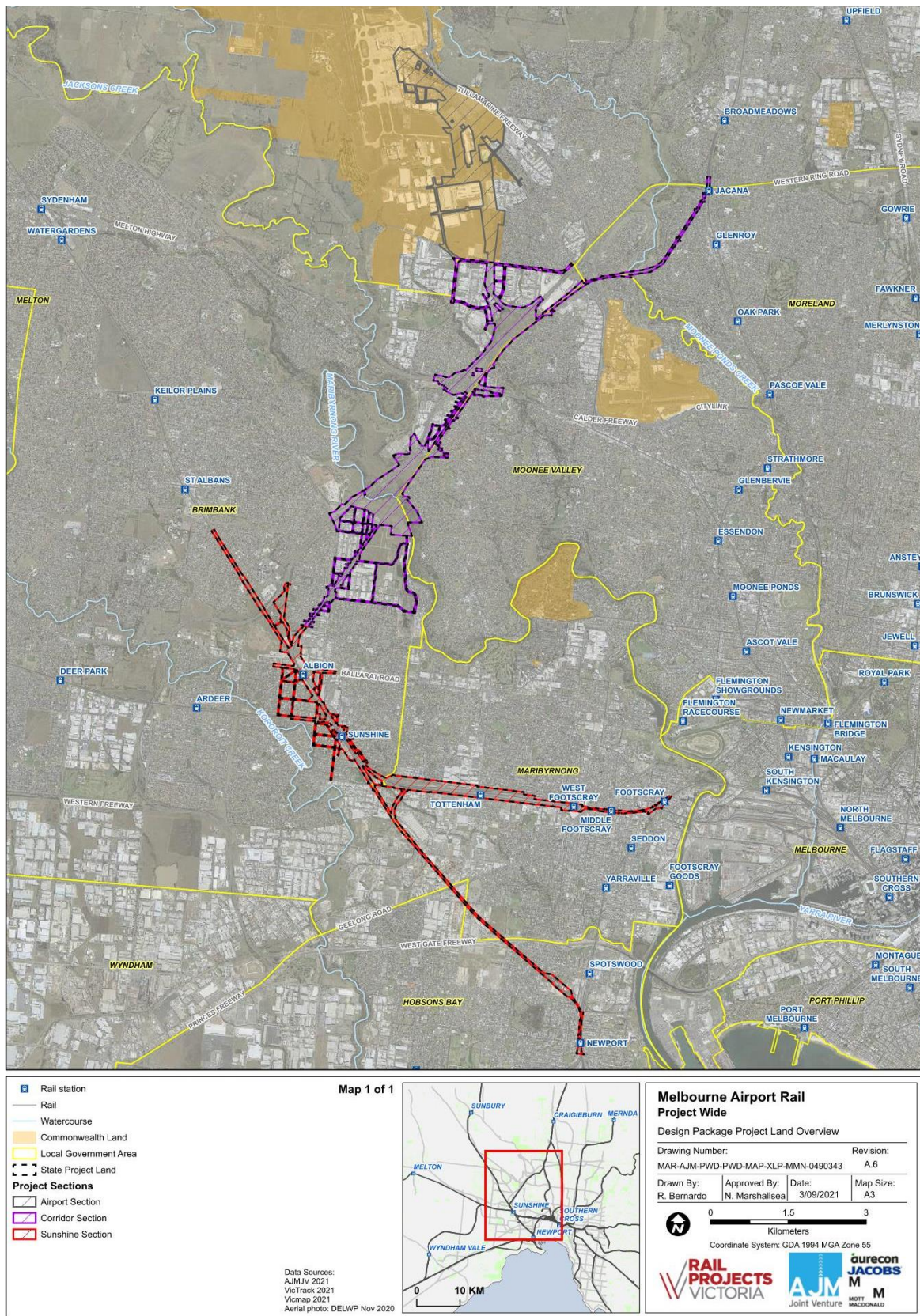


Figure 3.1 MAR State Project Land

3.3 Main Works Scope

3.3.1 Project Sections

The main works for the Project comprise of three geographically distinct sections. The sections are summarised in Table 3.1 and the location of the sections are shown in Figure 3.1.

Table 3.1 Summary of Project sections

Section	Summary
Airport section Not considered in State land approvals.	The Airport section generally includes all land relevant to the Project between Sharps Road, Tullamarine and Melbourne Airport and is located on Commonwealth owned land and is subject to a separate approvals process under the <i>Commonwealth Airports Act 1996</i>
Corridor section	The COR section generally includes the Albion-Jacana rail corridor between Jacana Station and south of Barwon Avenue, Sunshine North, as well as land between Sharps Road, Tullamarine and the Albion-Jacana rail corridor.
Sunshine section	The SUN section generally includes the existing rail corridor between Barwon Avenue, Sunshine North and Middle Footscray Station. The SUN Section also includes the Sunbury rail corridor to Giniifer Station and the Brooklyn freight corridor to Newport Station.

3.4 Corridor Section Summary

The COR section of the Project includes the following main works:

- Construction of the new MAR tracks, comprising an approximately 8 km dual track railway and associated overhead line equipment (OHLE), combined services route (CSR) and track drainage works, including:
 - > A 2.3 km long elevated twin track viaduct structure between Sharps Road, Tullamarine and the Albion-Jacana rail corridor, crossing Steele Creek and the Western Ring Road including emergency and maintenance access points.
 - > New at-grade MAR tracks within the existing Albion-Jacana rail corridor, located on the Western side of the existing Australian Rail Track Corporation (ARTC) tracks.
 - > An elevated twin track viaduct structure across the Maribyrnong River valley, adjacent to the Western side of the existing state significant heritage bridge.
 - > Slewing of ARTC tracks between Keilor Park Drive and the Calder Freeway.
- Signalling works along the Albion-Jacana rail corridor between Jacana Station and Barwon Avenue, Sunshine North and within the new MAR corridor North of the Western Ring Road.
- Construction of an intake supply substation at Terror Street or the Northeast area of Brimbank Park and two traction substations at Fullarton Road and within the McIntyre Sidings, Sunshine North.
- Construction of two new Digital Train Radio System (DTRS) facilities one North or South of Keilor Park Drive, Keilor East and a second at Airport Drive, Tullamarine.
- Diversion, relocation and replacement works associated with utilities and underground services, including the existing ARTC CSR, high voltage (HV) transmission lines and numerous miscellaneous assets
- Protection works associated with the Exxon Mobil jet fuel pipeline along the Albion-Jacana rail corridor.
- Modifications to existing structures, including structural modifications and strengthening works at Calder Freeway inbound and outbound bridges, Fullarton Road bridge, Western Ring Road on-ramp and off-ramp bridges, Keilor Park Drive and McIntyre Road bridges.
- Replacement of shared use path (SUP) connections at Calder Freeway / Fullarton Road, provision of a new SUP overpass at Cranbourne Avenue, and provision of a Strategic Cycling Corridor link between Western Ring Road and Airport Drive via Steele Creek.

- The provision of retention basins at several locations along the Albion-Jacana rail corridor
- Establishment of temporary construction laydown areas, site offices, worksites, storage, parking areas and access roads

3.5 Sunshine Section Summary

The SUN section of the Project includes the following main works:

- Construction of a new 1.8 km long MAR twin track viaduct structure, including associated OHLE and CSR between Sunshine Station and the Albion-Jacana corridor, crossing Anderson Road, Ballarat Road, the Sunbury rail corridor, St Albans Road and Stony Creek.
- Signalling works, including the installation of trackside equipment along the Sunbury line towards Ginifer Station, along the Brooklyn freight corridor towards Newport Station, and along the Western rail corridor to West Footscray Station.
- Modifications to the tracks, formation, drainage, CSR, OHLE and signalling equipment for the MAR, Sunbury and Bendigo tracks from Albion to the beginning of the Jacana freight corridor
- Modifications to the Western and Eastern Albion Station forecourts and car parks.
- Modifications to Sunshine Station, including modifications to platforms, the Sunshine Station western car park and the construction of a new concourse.
- Modifications to the existing Sunshine and Sunshine West substations
- Diversion, relocation and protection of existing utilities and underground services.
- Establishment of temporary construction laydown areas, site offices, worksites, storage, parking areas and access roads

4. Review of relevant specialist reports, legislation and policy

Based on the scope of the Project, the Land Use and Traffic and Transport streams were considered to have complementary analysis for the purpose of the Impact Assessment. Members of these teams identified and provided relevant documents for review in this context.

4.1 Melbourne Airport Rail Integrated Transport Plan

The MAR Traffic and Transport team provided the Integrated Transport Plan (ITP)⁴ as the most relevant document to provide context for business and other non-transport impacts.

The ITP divides the corridor into key areas – Focus Areas, Corridor Impacts and Corridor Wider Network Improvements. These are defined as follows:

- Focus Areas: where the MAR project is likely to significantly change people's movement including wayfinding.
 - > It is noted that the Airport Station and Terminal Precinct focus area is out of scope for this Impact Assessment.
- Corridor-Place Specific Elements: where the MAR project is likely to result in direct impacts to the surface transport network, and will require mitigation measures delivered as part of the Project.
- Corridor Wide Network Improvements: elements that meet wider holistic transport network aspirations for the state and will be delivered partially or wholly as part of the Project. These may or may not address impacts of the Project or provide a direct benefit to MAR users.

4.1.1 Focus Areas

4.1.1.1 Sunshine Station Precinct

The station is strategically located in the heart of the Sunshine National Employment and Innovation Cluster (NEIC) around Hampshire Road which has been identified by Brimbank City Council as the “premier street” of the aspiring economic centre of Melbourne's West. Sunshine Station will be serviced by high-capacity metro trains connecting Melbourne Airport to the Metro Tunnel. MAR is one of several projects, for instance the Western Rail Plan (WRP), that would change conditions at Sunshine.

In the 2036 AM peak (07:00-09:00), it is forecast that the station will cater for around 4,200 entries and 2,900 exits, based on a peak frequency of 18 metropolitan and 18 regional trains per hour, with airport passengers accounting for around 1% of all station entries and exits.

Sunshine Station will become a major interchange station on the rail network. In the 2036 AM peak, it is forecast that around 4,400 transfer movements will be made at Sunshine Station, with airport passengers accounting for around 6%.


4.1.2 Corridor-Place Specific Elements

4.1.2.1 Albion Station Precinct and Sunshine North rail crossings

Albion Station is located within a precinct defined by Ballarat Road, Sydney Street, Ferguson Street, Talmage Street, St Albans Road and the Albion Triangle Development Site.

The station is currently accessible by car (primarily), bus and foot. The existing Sunbury Rail Corridor Strategic Cycling Corridor (SCC) terminates at the south east edge of the eastern station carpark and St

⁴ Melbourne Airport Rail Integrated Transport Plan, December 2020, MAR-AJM-PWD-PWD-REP-XTR-NAP-0001000



Albans Road walking and cycling path terminates north of Ballarat Road Service Road. Access to the platforms is via a narrow rail underpass.

In the 2036 AM peak (07:00-09:00), it is forecast that the station will experience significantly fewer passengers compared to Sunshine Station, at around 1,900 entries and 200 exits. There is no connection for passengers between Albion Station and MAR.

The following are proposed works around the Albion Station Precinct and Cranbourne Avenue in Sunshine North under the Project:

- Construction of viaduct accommodating MAR tracks to the west of Albion Station.
- Reconfiguration of Albion Station western forecourt in terms of interfaces to other modes
- Provision of vegetation and landscaping in the eastern car park.
- Continuation of the existing SUP to St Albans Road.
- Consolidation and upgrade of Albion-Jacana corridor pedestrian crossing

4.1.2.2 Fullarton Road SUP and Western Ring Road to Airport Drive / Sharps Road SUP via Steele Creek

The Calder Freeway and Western Ring Road are major movement corridors, particularly freight movements. Fullarton Road provides access to Keilor Park, Airport West and Keilor East via Woorite Place and Roberts Road.

At the Calder Freeway / Western Ring Road diamond interchange, the Western Ring Road SCC runs along the west side of the Albion-Jacana rail corridor, under the road bridges. It is currently accessible by the footpath along Fullarton Road and east of the rail corridor, as well as the footpaths along Borva Drive and Wonganella Drive that link to a narrow SUP bridge across the rail corridor.

Steele Creek and Steele Creek North are major open spaces and present a wider network improvement opportunity to close existing transport network gaps within the Brimbank municipality and to enhance access to the Western Ring Road SCC.

The following works are proposed by the MAR project:

- Construction of new tracks from Albion Station running north east along the existing track along Albion-Jacana Corridor
- Construction of new tracks via an elevated viaduct across the Western Ring Road to Airport Drive at Sharps Road
- Construction of new cycle and / or shared user path sections in line with gaps in the East Keilor to Melbourne Airport SCC

4.1.3 Wider network outcomes

In addition to the focus areas and place specific elements identified along the entire MAR corridor, the Project is likely to result in movement outcomes across the wider rail network, particularly at key rail stations.

Based on passenger demand modelling undertaken for MAR, the following wider network patterns are expected, noting that air passengers are likely to be carrying luggage and will have different requirements to regular commuter passengers:

- Airport passengers generally have relatively little impact on entry and exit volumes at inner-city and suburban stations;
- The impacts of airport passengers on transfer volumes are significant at MTP stations. The modelling suggests that State Library, Parkville and Sunshine stations will experience the highest level of airport transfer activity. The location of transfers is highly dependent on the assumed rail network and will change if the assumed network is not realised;

- There is a moderate amount of airport travel that occurs in the opposite direction to weekday commuter flows. In these cases, airport passengers account for a higher proportion of the total number of passengers.

4.1.4 Relevance to the Impact Assessment

Accommodation of increased rail passenger demand is necessary to support development of businesses around Albion and Sunshine, otherwise this demand will default to the CBD. This extends beyond the provision of train and station capacity to all aspects of the journey, including rail interchange as well as active transport, bus and car pickup/drop-off services.

The ITP refers to urban renewal plans for the Albion and Sunshine areas. Improvements to existing transport links as well as the introduction of MAR will make the area more attractive for development.

Works around the Calder Freeway and Western Ring Road may interfere with road traffic. All efforts will be made to keep interference to a minimum. Tourism is identified as a significant source of future rail demand. Improvements to the Albion and Sunshine Precincts will attract tourists to stay in these areas rather than closer to the CBD and promote development of tourism-related businesses.

4.2 MAR State Land Traffic and Transport Assessment (Rev B)⁵

Building on the ITP, the AJM Traffic and Transport team prepared an assessment of the effects of MAR on both the corridor and the wider transport network on State land in terms of both construction and legacy impacts. Those that are relevant to business are noted below.

4.2.1 Construction Impacts

Construction planning for the Project is currently underway, however preliminary information has been provided and has been considered. Comprehensive modelling of construction has not been completed but will be undertaken once a calibrated and validated traffic model has been agreed with VicRoads and all construction scheduling and requirements have been refined and confirmed.

Construction activity will peak between the end of 2023 and beginning of 2025 with activity sites changing over time.

Workforce requirements have not been advised but based on similar truck requirements to workforce as identified for MTP would equate to between 20 and 160 workers per construction zone, which conservatively could equate to 20 to 160 arrivals in the morning and 20 to 160 in the afternoon.


Construction trips typically do not coincide with road network peak hours, with workforces generally arriving and departing before the wider road network peaks and truck movements generally scheduled to occur between peaks.

Overall construction traffic is not anticipated to have a material impact on the operation of the road network, however access to individual sites will need further consideration when more information is available including:

- Gilmour Road construction zone, with relation to road space land take requirements.
- Albion car park and corridor construction zone, with relation to the breakdown of different construction vehicle access requirements and daily quantum of larger vehicles.
- Chaplin Reserve construction zone, with relation to the timing of this site's residential development and need to access MAR construction sites through the area.

The major construction impact of the Project will occur due to road disruptions and closures required to facilitate access to works areas, including the need to locate large plant and to provide suitable clearance to works area, particularly bridges.

⁵ July 2021, MAR-AJM-PWD-PWD-REP-XTR-NAP-0001724



Airport Drive is the one area of the Project which will require major road works, as this will need to be realigned to facilitate appropriate rail alignment on the viaduct. However, current construction planning indicates that this can be mostly undertaken retaining similar road functions as at present. Closures will however be required to allow the installation of larger components of the viaduct, although these would generally be able to be scheduled overnight.

Road disruptions will be minimised as much as possible with full road closures for most roads limited to night periods only. Current construction planning suggests that three roads would require more significant road closures including over peak times and these are:

- Fullarton Road
- Ballarat Road service roads west of Albion Station – closed for approximately 21 months
- Anderson Road – two weekend closures and a 20-day full closure

Information to date suggests that the Ballarat Road service road closure is primarily to facilitate construction vehicle access to the site rather than for works. Further work is being undertaken to see if this can be reduced and managed as it is recognised that a long closure would:

- Impact two bus routes that exit the west and eastbound carriageways of Ballarat Road at Adelaide Street via the service roads (avoiding a more dangerous right turn manoeuvre)
- Impact direct access to residential and commercial properties accessed from the service road
- Increase right turn movements across Ballarat Road into and out of Adelaide Street and from the eastbound service road.

Full closure of Anderson Road should also be minimised as alternative routes are limited and would likely have significant impacts to the local community or for displaced journeys. Engagement will be required with the Department of Transport (DOT) and Brimbank City Council (BCC) to finalise appropriate strategies for works that impact the connectivity of Anderson Road.

Heat maps of road closures and impacted areas were prepared to indicate which areas will be most severely affected. Travel demand management plans and Construction Management Plans will be prepared to identify management strategies and any upgrade requirements that are necessary to manage increased traffic from key major road disruptions in accordance with the requirements of the EMF.

The Project crosses the M80 Western Ring Road. To facilitate construction, it is proposed to reduce the width of lanes with short periods of night lane closures and intermittent night closures. Lane width reductions and speed adjustments would impact capacity and modelling will be undertaken to understand the full impacts.

The management of night closures will be developed in consultation with DOT and appropriate diversion routes identified. Full night closures are anticipated to allow structural upgrades of road bridges to occur, however, these will typically be intermittent limiting to one or two nights during the construction period.

Construction management plans will need to be developed for construction zones and for road, public transport and active transport network impacts.


4.2.2 Legacy Impacts

The Project will result in the following changes to patronage at Albion and Sunshine Stations:

- Attract 900 additional patrons per day to Sunshine Station (excludes transferring passengers) with 300 anticipated between 7am and 9am, primarily comprising walk and bus mode transfers
- A minor shift in passengers from Albion to Sunshine Station for rail network entry by some car mode travellers due to the relocation of approximately 70 car parking spaces from Albion to Sunshine.

The Project will trigger a need to replace three active transport connections across the rail corridor. The proposed mitigation is considered reasonable and appropriate as follows:

Barwon Avenue underpass and Drake Street level crossing



The Project will upgrade and rationalise the current Albion – Jacana line crossing points to deliver a safe, elevated active transport link over the rail corridor which will meet primary desire lines for walking and cycling.

M80 Trail under Calder Freeway and Fullarton Road

The SUP will be relocated to the south east side of the rail corridor to allow for MAR rail tracks, this will include upgrades to the existing rail active transport overpasses either side of the road corridors and the pedestrian underpass of the road to compliant SUP designs. The works will result in a minor increase to the connectivity of the M80 SCC at Calder Freeway but will benefit cycle connectivity between Keilor East and Airport West and Airport West and Keilor Park.

Anderson Road Southern SUP

The need to accommodate additional tracks over Anderson Road means that the existing SUP bridge to the south of the existing rail bridge cannot be retained. It will be replaced with a new SUP located just to the south of the current alignment, effectively replacing like with like.

4.2.3 Relevance to the Impact Assessment

As discussed under the ITP, accommodation of increased rail passenger demand is necessary to support development of businesses around Albion and Sunshine, otherwise this demand will default to the CBD.

Construction will result in some reduction in capacity and or closure of arterial links within the road network which will need to be managed through understanding timing and scale of potential impacts, development of appropriate diversion routes and traffic management strategies that will recognise base and diverted transport needs as well as amenity issues to local businesses.

The replacement of the three active transport connections is expected to improve overall connectivity within the precinct, thus improving travel times between customers and businesses, generating agglomeration benefits.

4.3 MAR State Land Use Planning Assessment (Rev B)⁶

The MAR State Land Use Planning Assessment builds on the 2020 MAR State Land Use Planning Existing Conditions Assessment⁷ to identify the potential land use planning impacts resulting from Project works, including both temporary (construction) and permanent (operational).

4.3.1 Planning Policy Context

The Land Use Assessment highlights the state and local strategic planning policies that support the Project. These included:

4.3.1.1 Plan Melbourne 2017-2050⁸

Plan Melbourne recognises Melbourne Airport as a major transport gateway and supports its role as a key location for employment and economic activity. A key objective of Plan Melbourne is also to provide an integrated transport system for Melbourne that “connects people to jobs and services and goods to market.”

Plan Melbourne also identifies the ‘Airport Rail Link’ as a potential transport infrastructure project. Sunshine is identified within Plan Melbourne as an area that has potential to build a critical mass of tertiary education, health-related training, health care and retail and professional services, as well as facilitate private investment. This will further improve from the connections established via the completion of the MTP and the Project.

Within Plan Melbourne, Sunshine is recognised as a key strategic centre for Melbourne’s north west, being both a NEIC and a Metropolitan Activity Centre as well as a health and education precinct,

⁶ March 2021, MAR-AJM-PWD-PWD-REP-XLP-NAP-0001712

⁷ August 2020, MAR-AJM-PWD-PWD-REP-XLP-NAP-0001208

⁸ DELWP 2017

4.3.1.1.1 Plan Melbourne Addendum⁹

The updated 2050 plan sets out the commitments that the Government has made to build several major infrastructure projects including MAR. It also acknowledges the early investigation of new projects, including the elements of the Western Rail Plan beyond completion of the Project.

4.3.1.2 Sunshine NEIC Draft Framework Plan¹⁰

The Draft Framework Plan seeks to guide land use, development and infrastructure investment in accordance with Plan Melbourne. This is implemented by setting out high level principles and a series of actions that generally focus on strategies to unlock land for redevelopment, improve the integration of transport and enhance the public realm and connectedness of the four key precincts.

The key strategies that underpin the Draft Framework Plan seek to:

- Build on investment in healthcare and education, to improve the amenity of the Sunshine Cluster, to encourage the establishment of new businesses and services, to improve transport links and public transport and to coordinate business attraction and investment.
- Deliver an integrated transport network linking pools of workers within the key job centres in the Sunshine Cluster.
- Build stronger transport connections within the cluster and link it to the wider region to provide efficient access to employment, industry and regional infrastructure.

The Draft Framework Plan does not consider the specific role the Project will play within the Victorian rail network; however, it acknowledges the role of large infrastructure projects in enhancing transport connections and access to employment opportunities in the NEIC.

4.3.1.3 Priority Precincts¹¹

The Department of Jobs, Precincts and Regions (DJPR) identifies six 'Priority Precincts' in the report of the same name as areas of opportunity to boost innovation, productivity and build on Melbourne's commercial success. Sunshine is identified as one of these.

The policy notes that public investment is enabling the development of Sunshine into a major transport and employment hub which will service western Melbourne. This includes specific mention of the 'Melbourne Airport Rail Link' project.

4.3.1.4 Sunshine Town Centre Structure Plan¹²

The objectives, strategies and actions detailed within the Structure Plan were developed in the context of 2014 which recognised the future regional rail hub Sunshine station would become as part of the development of Regional Rail Link (RRL). The Structure Plan also recognised the potential for future projects to influence the growth of the western region and provide economic opportunities, including:

- The Outer Metropolitan Ring
- An airport rail link option via Albion and Sunshine stations
- The electrification of the Deer Park line to Melton.

These potential projects, as well as the regional population growth and growth in employment industries within the municipality are recognised by Brimbank City Council as significant drivers of economic opportunity.

⁹ DELWP 2019

¹⁰ VPA 2017

¹¹ DJPR 2019

¹² Brimbank City Council 2014

4.3.1.5 Albion Neighbourhood Plan¹³

The Albion Neighbourhood Plan recognises the need for an active and accessible Albion station as part of the overarching vision for Albion. The ideas provided in the Albion Neighbourhood Plan support the preferred outcome detailed in the Sunshine Town Centre Structure Plan and support Brimbank City Council's desire to intensify use around Albion station and improve the amenity of the station.

4.3.1.6 Brimbank Transport Priorities Paper 2018¹⁴

The Transport Priorities Paper acknowledges that key transport infrastructure for the west passes through Brimbank, which is ideally placed to provide services and facilities for the region, however improvements across all modes of transport are needed in the short and long term.

The Transport Priorities Paper recognises the vital role the Sunbury and Melton rail lines play in Brimbank's public transport network and distinguishes the improvements to the network supported by RRL, the Metro Tunnel and the future ARL.

4.3.2 Land Use Planning Assessment Considerations

The Land Use Planning Assessment focuses on similar areas to the Impact Assessment, in particular the impact of temporary and permanent occupations on properties in the Project Land. As such, there is some overlap with the analysis in this study.

Key points considered from the draft assessment include:

- At HV McKay Memorial Gardens, the area impacted by temporary works be reduced where possible to avoid unnecessary temporary impacts on existing land uses;
- Stakeholder engagement is recommended with the owners / occupiers of sites in the construction laydown area to confirm the feasibility of temporary occupation;
- Impacts on land within the existing Public Acquisition Overlay (PAO) introduced into planning schemes for an earlier iteration of the Project are of less concern in land use terms than the affected area outside the PAO, as acquisition of these properties has been anticipated for over a decade;
- Several planning applications have been made on land within the study area, but construction has yet to start. These are primarily on land marked for temporary occupation. The developers should be contacted as part of stakeholder engagement. These include:
 - > Chaplin Reserve, 116 Anderson Rd, Sunshine
 - > Albion Triangle, 505 Ballarat Road Sunshine, 503A Ballarat Road and 157 Anderson Road, Sunshine North
- Sites with existing business/industrial uses that will be affected by occupation are covered in Section 6 of the Impact Assessment.

4.3.3 Relevance to the Impact Assessment

4.3.3.1 Policies

Sunshine and Albion have been identified at both the state and local level for future urban renewal and intensification. This is indicated by the designation of Sunshine as a NEIC under Plan Melbourne, which is given effect by several state and local policies including the Sunshine NEIC Draft Framework Plan, Sunshine Town Centre Structure Plan and Albion Neighbourhood Plan.

These state and local policies are aligned in their future vision for Sunshine and Albion, including higher density mixed use development around existing stations supported by an integrated transport system. Consideration should be given to the alignment of the Project with these plans and policies.

¹³ Brimbank City Council 2013

¹⁴ Brimbank City Council 2018

4.3.3.2 Direct impacts

The Land Use Assessment recommends that consultation should be undertaken with affected landowners and businesses regarding the construction laydown area. These occupations directly impact several businesses as well as a wider range of land uses. AJM recommend RPV consider further design refinement in line with recommendations to reduce potential amenity impacts associated with Project infrastructure, and in particular elevated components, on surrounding land uses.

Whilst impacts are anticipated, it is acknowledged that land use impacts during construction will be temporary in nature and therefore would not preclude the ongoing use of the land following the conclusion of the Project. Furthermore, the implementation of standard construction management practices and compliance with statutory regulations would ensure impacts from construction activities are managed to an acceptable level.

Where commercial and industrial land is being partially acquired, either temporarily or permanently, consultation should be undertaken with the landowner and/or business currently operating to confirm the viability of the ongoing use of land. Several sites have planning applications in pre-construction stages, and the developers are being contacted as part of stakeholder engagement.

4.4 Other relevant legislation and policy

4.4.1 State legislation

Transport Integration Act 2010

The *Transport Integration Act 2010* has several transport system objectives relevant to the Project. The Act outlines the importance of a transport system that provides access to economic opportunities to support individual and community wellbeing. It also highlights that transport and land use should be effectively integrated to maximise access to residences, employment, markets, services and recreation as well as facilitating better access within local communities.

It is likely the Project will result in improved accessibility of the transport network for communities surrounding the assessment area. The Impact Assessment considers potential economic benefits that may accrue for the community as a result.

Planning and Environment Act 1987

The *Planning and Environment Act 1987* includes objectives that ensure the effects on the environment as well as social and economic effects are considered when decisions are made about the use and development of land.

The Impact Assessment considers the relevant economic impacts and opportunities accruing from the Project.

Major Transport Projects Facilitation Act 2009 (MTPFA)

The MTPFA provides a comprehensive legislative regime for the delivery of major transport projects in Victoria, including the ability to compulsorily acquire and temporarily occupy land and powers in relation to Crown land, utilities and roads (amongst others).

MAR has been declared under the MTPFA and the Project intends to rely on these legislative delivery powers.

Compulsory acquisition can only occur following receipt of planning approvals and following designation of the project area under the MTPFA. Where land is compulsorily acquired or temporarily occupied in accordance with the MTPFA, the LACA guides the acquisition and compensation process.



Land Acquisition and Compensation Act 1986 (LACA)

Any temporary occupation or permanent acquisition of land required for MAR is intended to be conducted in accordance with the LACA and the MTPFA. The LACA sets out the compulsory acquisition process and how compensation is determined.

Under the MTPFA and LACA, once planning approvals have been obtained and the project area designated, the project authority for MAR would be empowered to compulsorily acquire interests in land, and be required to compensate anyone with an interest in that land. This would include compensation for business disruption or relocation which occurs as a natural, direct and reasonable consequence of the compulsory acquisition of the property.

The amount of compensation payable to a business would be assessed on a case by case basis, in accordance with the compensation principles prescribed by the MTPFA and LACA.

The MTPFA and LACA allow for individual cases to be assessed on their merits to determine the most appropriate type and level of assistance to be provided. In relation to business tenants, the principles are largely the same, although the expenses that may be claimed are related to the early termination of occupation rights under a lease.

The Impact Assessment notes the availability of this legislative compensation regime where a business has an interest in land that has been compulsorily occupied or acquired.

4.4.2 Local policy

Table 4.1 outlines some of the key local policies that relate to the Project.

Table 4.1: Local policies aligned to the Project

Authority	Policy	Description	Alignment with MAR
Brimbank City Council	Economic Development Strategy 2016-2020 ¹⁵	The Economic Development Strategy plays a crucial role in positioning Brimbank for further growth and development. It seeks to increase opportunities for business activity and investment, facilitate participation in employment and education, build the competitiveness and resilience of the Brimbank economy and support the ongoing economic wellbeing of the community.	Changes to connectivity and access could accrue from the Project as well as potential changes to public transport access which will allow for a more liveable and prosperous community. The Project would likely have impacts on the business activity, employment participation and resilience of Brimbank.
Brimbank City Council	Council Plan 2017-2021 ¹⁶	The Council Plan sets out agreed goals to achieve its strategic directions for an inclusive, liveable and prosperous community with an innovative and responsive council.	The Project may help produce economic benefits, that could accrue from changes to connectivity, access and improved public transport and how this would impact both regional and state prosperity.
Brimbank City Council	Brimbank Industrial Land Strategy 2018-2030 ¹⁷	The Industrial Land Strategy sets out the Council's vision for its industrial precincts and establishes a clear planning policy framework.	The Council has identified strategic work that may help Sunshine North including investigating options to improve connectivity over the rail line. The proposed Project is expected to benefit the regions' connectivity by providing more reliable and regular trains to the city and airport from both Sunshine and Albion stations. The economic assessment could evaluate the direct impact this would have on the Brimbank economy.
Brimbank City Council	Brimbank Activity Centre Strategy 2018 ¹⁸	The Brimbank Activity Centre Strategy 2018 provides a framework for the development of local activity centres to boost economic development, business engagement, access and sustainability in these areas.	The Project could improve connectivity across the rail corridor or between the station and to the facilities and services in the adjoining retail precinct.
Brimbank City Council	Brimbank Cycling and Walking Strategy Update ¹⁹	This strategy notes a community desire to create more local pedestrian and cycling routes to increase local connectivity to community destinations	The Project has the opportunity to improve local access and connectivity for active transport. The economic assessment should explore the impact on growth and employment that increased active transport would have.

¹⁵ Brimbank City Council, Economic Development Strategy (2016-2020)

¹⁶ Brimbank City Council, Council Plan 2017-2021

¹⁷ Brimbank City Council, Industrial Land Strategy 2018-2030

¹⁸ Brimbank City Council, Brimbank Activity Centre Strategy 2018

¹⁹ Brimbank City Council (2016), Brimbank Cycling and Walking Strategy 2016

Authority	Policy	Description	Alignment with MAR
Brimbank City Council	Brimbank Community Vision 2040 ²⁰	Establishes a shared framework for the community and partner organisations to work towards for the next 20 years.	One of the key community aspirations in this policy is for all modes of transport to be well connected and accessible. The Project has the potential to provide an accessible transport network and the impact of the this on the Brimbank economy.

²⁰ Brimbank City council (2019), Brimbank Community Vision 2040

5. Existing Conditions

5.1 Economic baseline

This section describes the current economic profile of the Project Land. Although the Project Land includes Local Government Areas (LGAs) of Moreland, Hobsons Bay, Hume, Brimbank, Moonee Valley and Maribyrnong, many of these locations are not expected to experience works impacting businesses. For relevance, the analysis within this section has focused on LGAs (and smaller areas within these) that will be impacted by the Project, in particular Brimbank and Moonee Valley. This is because the proposed State Land works are mainly contained within the rail corridor in these two LGAs.

Where possible data is presented at the Statistical Local Area 2 (SA2) level for Keilor, Keilor East, Sunshine, Sunshine North and Ardeer – Albion. These areas have been highlighted yellow in Figure 5.1. Where this data is not available, statistics for Brimbank and Moonee Valley councils have been provided. Broader Greater Melbourne and Victorian data is also shown for context.

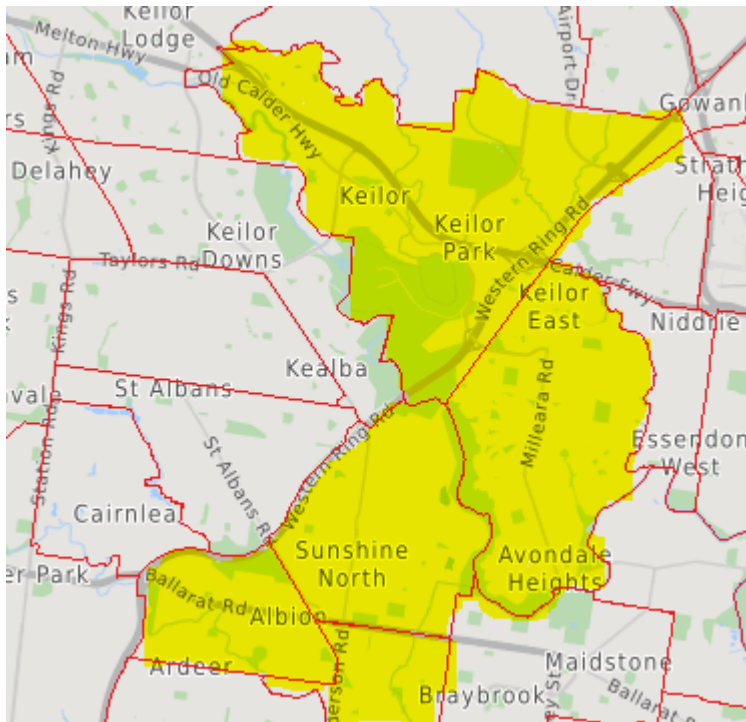


Figure 5.1: Statistical Local Area's relevant for the economic baseline

Source: ABS Maps

5.1.1 Regional context

5.1.1.1 Headline size of the economy

Over the past decade many suburbs west of the Melbourne CBD have experienced strong growth. The western metropolitan area of Melbourne is seen as the most culturally diverse area in Victoria. The Greater Melbourne region contributed around \$337 billion to gross domestic product (GDP) in 2018, which is about 82% of Victoria's total GDP.²¹ City of Moonee Valley (Moonee Valley) experienced a slower rate of growth than the Victorian average at 1.7% per annum and City of Brimbank (Brimbank) grew at 2.8% per annum. The rates of growth for these regions are relatively more volatile than in Victoria and Greater Melbourne since 2006, representing an opportunity for the Project to help improve productivity through business

²¹ The Gross Regional Product (GRP) of an area is the equivalent of Gross Domestic Product (GDP), but for a particular region.

development and tourism growth. In 2018, the largest industry for Brimbank and Moonee Valley were Manufacturing and Retail Trade respectively.

Table 5.1: Gross Regional Product 2006 to 2018

Location	Unit	2006	2011	2016	2018
City of Brimbank	GRP (\$m)	6,678	7,700	8,592	9,075
	% growth		2.9%	2.2%	2.8%
City of Moonee Valley	GRP (\$m)	4,401	4,968	5,214	5,389
	% growth		2.5%	1.0%	1.7%
Victoria	GRP (\$m)	306,805	344,097	387,457	411,541
	% growth		2.3%	2.4%	3.1%

Source: ID profiles

5.1.1.2 Population and demography

The population in the assessment area has seen relatively slow growth compared to Greater Melbourne and Victoria from 2018 to 2019. Keilor East experienced the highest growth of the four suburbs at 2.0% per annum while Sunshine North experienced the lowest at 0.4% per annum.

Table 5.2: Population by SA2, 2018-19

Location	2018	2019	% Growth
Ardeer - Albion	8,458	8,530	0.9%
Keilor	9,065	9,113	0.5%
Keilor East	28,106	28,673	2.0%
Sunshine	10,539	10,641	1.0%
Sunshine North	12,487	12,533	0.4%
Greater Melbourne	4,964,713	5,078,193	2.3%
Victoria	6,462,019	6,596,039	2.1%

Source: ABS Regional Population 2018-19, Population estimates by Statistical Area Level 2, 2018 to 2019

Similarly, Victoria in Future projections estimate the population in these suburbs will continue to accelerate slower than that of Greater Melbourne and Victoria. Brimbank is expected to grow at 1.9% per annum to 2021 and Moonee Valley at 2.9% per annum, compared to 5.4% in Greater Melbourne and 3.0% in Victoria.

Table 5.3: Population forecasts 2021 and 2036

Location	2021	% annual growth from 2016	2036	% annual growth from 2016
City of Brimbank	213,357	1.9%	244,500	1.2%
City of Moonee Valley	134,612	2.9%	167,779	1.8%
Greater Melbourne	5,843,344	5.4%	6,884,129	2.2%
Victoria	6,861,924	3.0%	8,722,766	2.0%

Source: Victoria in Future 2019, Population and Household Projections

5.1.1.3 Industry composition of the area

In the 2016 Census, there were 34,062 persons who identified Sunshine, Ardeer – Albion, Sunshine North, Keilor or Keilor East as their Place of Work. Place of Work data provides information on where employed

people over the age of 15 worked in the week prior to Census night. By looking at Place of Work by Industry Employment the industry composition of the area is identified.

Table 5.4: Top industries by SA2

Sunshine	Ardeer - Albion	Sunshine North	Keilor	Keilor East
Public Administration and Safety (1,239)	Manufacturing (238)	Manufacturing (1,114)	Transport, Postal and Warehousing (4,144)	Health Care and Social Assistance (795)
Health Care and Social Assistance (1,296)	Electricity, Gas, Water & Waste Services (170)	Education and Training (406)	Manufacturing (3,218)	Education and Training (508)
Retail Trade (931)	Health Care and Social Assistance (168)	Construction (394)	Construction (2,571)	Retail Trade (358)

Source: Australian Bureau of Statistics, Census of Population and Housing, Place of Work by Industry 2016, TableBuilder

The top four industries employ around half of the people who work in this area; these being manufacturing, transport, postal and warehousing, construction and health care and social assistance. As shown in Table 5.5, there are proportionally more people employed in construction, manufacturing and transport, postal & warehousing in the area than in Victoria.

Table 5.5: Place of work by top industries

Industry	Total number of jobs	Percent of total jobs	Victoria	Percent of total
Manufacturing	5,405	16%	212,953	8%
Transport, Postal and Warehousing	4,991	15%	129,638	5%
Construction	3,692	11%	227,398	8%
Total (top 3 industries)	14,088	41%	569,989	21%

Similar findings result from Brimbank LGA Gross Value-Added statistics, where manufacturing, transport, postal and warehousing and wholesale trade make up the top three largest industries of value add in 2019.²²

5.1.1.4 Business trends

The ABS collect and reports the number and size of businesses annually. Local business and industry data for the Ardeer – Albion, Keilor, Keilor East, Sunshine and Sunshine North SA2s is shown in Figure 5.2. This is the area that is most relevant to the Project, with the potential for some of the businesses to provide local resources for the Project. Each of the regions analysed reflect characteristics of Victoria, being made up primarily of small employers.

At June 2019, the number of businesses operating in the combined area was 7,094 and of these businesses, around 97% were small businesses employing less than 20 persons. Comparatively, in Victoria, Brimbank and Moonee Valley, small businesses employing less than 20 persons represent 98% of all businesses (in each of these areas).

The greatest number of registered businesses in the combined area is represented by Construction (19%) and Transport, Postal and Warehousing (14%). There are also a number of manufacturing companies that employ five or more staff that may be able to provide skills and equipment relevant to the Project.

²² City of Brimbank, Value Added by Industry – Economy.id, accessed 23 Jan 2020

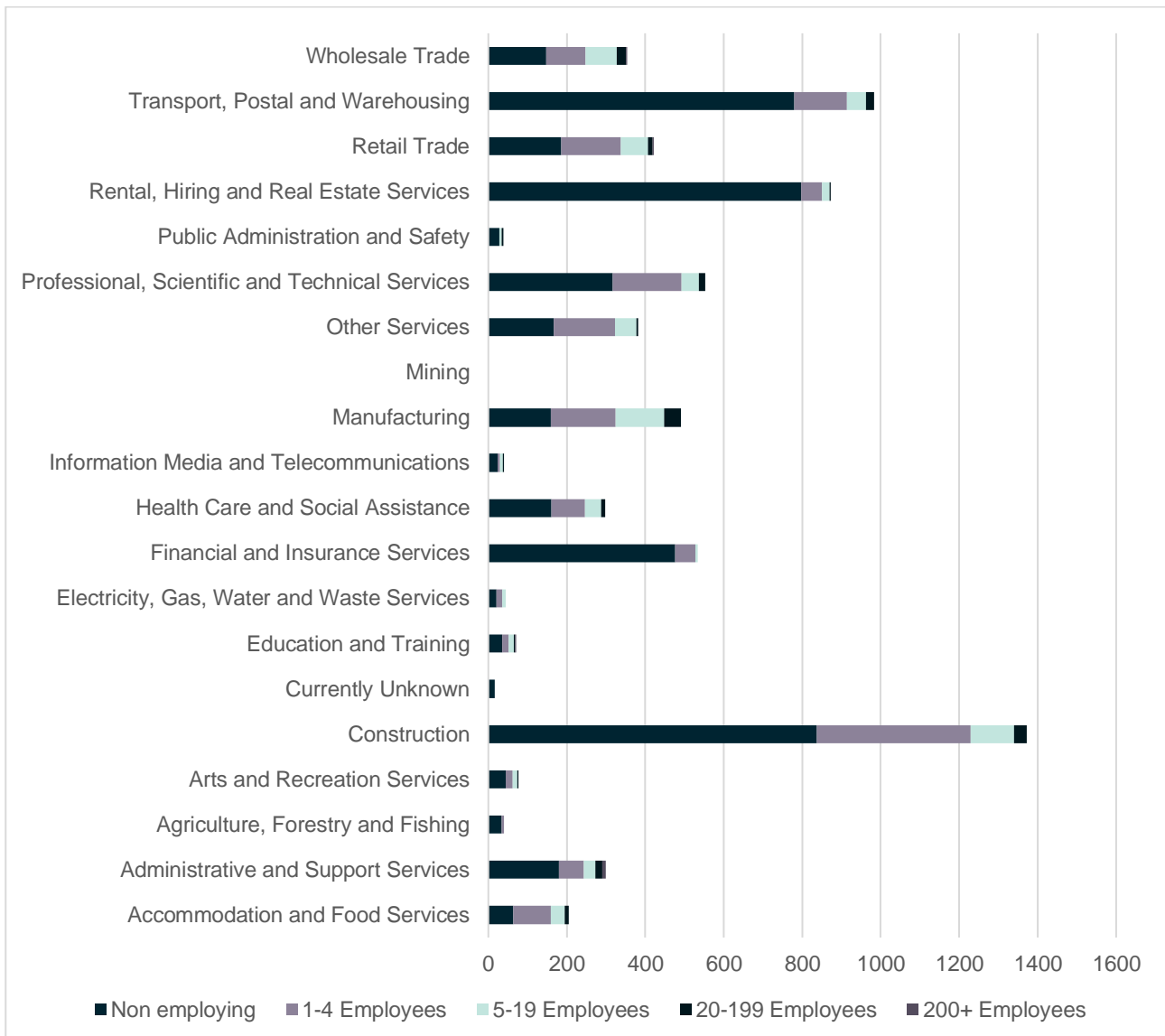


Figure 5.2: Total registered businesses, June 2019, Ardeer – Albion, Keilor, Keilor East, Sunshine, Sunshine North

5.1.1.5 Employment

The Victorian unemployment rate increased from 4.8% in June 2019 to 7.7% in June 2020 as shown in Table 5.6. The SA2 areas within the Project Land also followed similar trends, with all except Ardeer – Albion experiencing higher unemployment rates in June 2020 than June 2019. Ardeer – Albion, Sunshine and Sunshine North have all experienced significantly higher unemployment rates relative to Victoria for the last few years.

It is noted that in 2020, unemployment rates across Victoria have increased due to the impacts of COVID-19.

Table 5.6: Unemployment statistics by SA2, June 2019- 2020

Location	2019 unemployment rate	2020 unemployment rate
Ardeer - Albion	9.7%	9.3%
Keilor	2.9%	3.7%
Keilor East	3.2%	4.3%

Location	2019 unemployment rate	2020 unemployment rate
Sunshine	9.1%	9.8%
Sunshine North	11.7%	11.9%
Victoria	4.8%	7.7%

Source: Department of Education, Skills and Employment, Small Area Labour Markets – June 2020, by SA2

5.1.1.6 Tourism economy

For the past six years, Brimbank has experienced varying but generally increasing levels of tourism. In 2017, significant growth in visitor numbers occurred, with an increase of 106% to more than 1.2 million visitors (up from 620,000 visitors as at 2016). This was not representative of the six-year trend, however, and it returned to form over the next two years. Declines are observed in several years such as in 2018 which saw visitor numbers decline by 29% to 907,000 as compared to the previous year, or in 2020 which saw an 11% drop in visitor numbers to 892,946. No Brimbank-specific event was identified as a driver for either the 2017 peak or the 2018 decline; however, the 2020 decline can be explained by COVID-19 lockdowns limiting travel to and within Victoria.

Victoria has experienced relatively flat growth in visitor nights fluctuating between 2% and 15% (apart from 2020 which saw a decline of 24% compared to the previous year). Although this data shows accommodation tourism, it does not give an indication of how many tourists visit the area during the day.

Melbourne's West Tourism Board is an urban regional tourism board incorporated for the purpose of developing a more competitive tourism sector in Melbourne's West including in Brimbank and Moonee Valley. They are currently working with stakeholders to build partnerships and leverage resources to grow the capability of the sector and the quality of the visitor experience in the region.

While COVID-19 may impact tourist demand over the next few years, this research indicates that in the long term, tourism is a strong area of growth and the region has the potential to gain benefits from infrastructure that supports tourism. For an airport rail connection, these benefits are likely to be localised around railway stations.

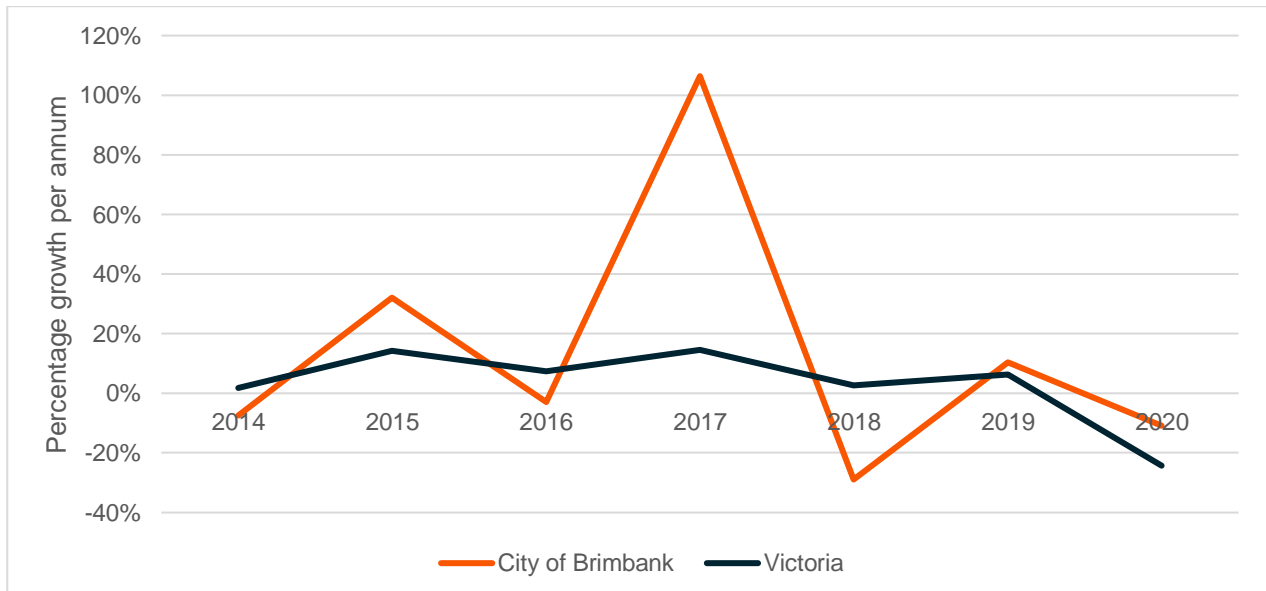


Figure 5.3: Growth in tourism visitor nights per annum 2014-2020

Source: ID Community (2018), City of Brimbank Economic Profile

5.2 Existing businesses in the Project Land

Table 5.7 shows the existing businesses that are located within the Project Land identified for the Project for permanent acquisition, temporary occupation or access restrictions. A full list of these businesses, provided by DOT, is shown in Appendix B.

Table 5.7: Existing businesses in the Project Land

SA2 name	Businesses impacted
Ardeer – Albion	There are two parcels of land to the north of Ballarat Road containing a small proportion of land that will be impacted by temporary and permanent works.
Sunshine	The two parcels located in the Sunshine SA2 with temporary works anticipated are currently vacant land with developments expected in the future. There is also one property with a small portion of car park located on land that will be permanently impacted.
Sunshine North	There are approximately five businesses located in the Sunshine North SA2 that will be impacted by temporary and permanent works. There is also one car park belonging to a business that will experience impacts. In addition, over 10 parcels of land are currently vacant but under plans for development.
Keilor	There are approximately 17 businesses located in the Keilor SA2 that will be impacted by temporary and permanent works. This includes some businesses that are located across multiple parcels. There are also about five sites vacant or assumed to be used for industrial purposes.
Keilor East	There are no known businesses located on land identified for the Project within Keilor East.

5.3 Development sites in the Project Land

There are several development sites within or nearby the proposed project works. These are described in Table 5.8 with the potential impacts assessed in Section 6.3.

Table 5.8: Development sites in the Project area

Name	Description	Size
River Valley Estate	River Valley Estate is a residential estate located to the west of the Maribyrnong River in Sunshine North. It is just south-east of the Solomon Heights Precinct. The Estate has been under development for several years and Atlantic Link has plans for stage 7 of the development in coming years.	129 hectares
Solomon Heights Precinct ²³	The Solomon Heights Precinct is an undeveloped and un-serviced subdivision containing 433 privately owned lots. It was originally created as a residential subdivision and rezoned to industrial in the 1940s. The Precinct forms part of the Sunshine National Employment and Innovation Cluster (Sunshine NEIC) identified in Plan Melbourne 2017-2050. The Brimbank Industrial Land Strategy 2018-2030 has identified the Precinct as a transitional area with the potential for existing zone to change in the future. However, there are several issues impacting its development including the land containing endangered flora and fauna species and limited road access.	32.8 hectares
Schiavello HQ ²⁴	Schiavello HQ is a manufacturing plant and office space which was completed in 2005 as the international Schiavello headquarters. It is located on the corner of Sharps Road and Metropolitan Ring Road.	7 hectares
Former Darling Flour Mill site ²⁵	Previously known as the John Darling & Son Flour Mill, this mixed-use development site is located opposite Albion station. It is owned by Pelligra Group who plan to build a 120-room hotel with café and banquet area and an administration office covering a space of 53 metres square.	1 hectare

²³ <http://www.glenoraestate.com.au/wp-content/uploads/2019/12/12.8-Report-Brimbank-Council-06-012-2019-Solomon-Heights.pdf>

²⁴ <https://www.schiavello.com/construction/about/story>

²⁵ <https://www.epicongroup.com/epicon-project-flourmill/>

6. Impact Assessment

This section outlines the potential impact and opportunities the Project will have on existing businesses and employment within the Project Land, as well as mitigations for potential impacts.

Mitigations will be implemented through a Business Disruption Plan (BDP) which will be formalised through the Environmental Management Framework (EMF), prepared and approved in accordance with the relevant planning approval. The BDP will document the means by which the contractor will manage potential impacts to non-acquired businesses, commercial property owners and not-for-profit organisations as well as ensure appropriate engagement with local councils, businesses, property owners and the community throughout construction.

The provisions of the BDP will be informed by relevant factors including the outcomes of RPV stakeholder engagement, the final project footprint, and the recommendations of the Business Impact Assessment. These are likely to include maintenance of access (or provision of alternative access) during temporary occupation, and appropriate notice to businesses before works commence.

6.1 Direct business impacts

As described in Section 5.2, there are a number of businesses located on land that has been identified for the Project. The Project Land that will be affected, and the type of impact, is shown in Appendix A. Businesses located on this land will need to relocate if the impact is permanent or will likely experience a loss in revenue if the impact is temporary or access related. In addition, businesses in the surrounding areas of the Project may be impacted by the loss of agglomeration benefits, construction or access.

Where land is temporarily occupied or permanently acquired for the Project, businesses may be entitled to claim compensation under the MTPFA and LACA for business disruption (amongst other matters) as a natural, direct and reasonable consequence of the occupation or acquisition of land.

6.1.1 Temporary impacts

Businesses within the areas identified for temporary works are expected to be impacted during the construction phase of the Project. Businesses will likely experience a loss of revenue, and in some cases, may not be able to operate during this time which may lead to the businesses relocating or closing.

6.1.1.1 Potential construction impacts

The businesses identified in Section 6.1.1 may experience impacts including decreased footfall, perceived and actual revenue loss due to construction activities. It is difficult to evaluate the exact business revenue loss related to the Project without consulting business owners, but a survey or interviews could be

undertaken by the RPV stakeholder engagement team to gain a better understanding. Where land is temporarily occupied, the compensation regime under the MTPFA and LACA will be enlivened.

As an example of the potential impacts that businesses may experience, a study by the ACT government in Gungahlin²⁶ surveyed a portion of the businesses in the area to identify the business impact of government-led construction activities. The results of this survey found that 69% noticed a significant deterioration in footfall and an average perceived revenue decrease of 32%. The Sydney light rail project has also caused disruption to businesses in the area, with a reported 60 businesses significantly impacted during the first 3 years of the 5-year construction period. It has been estimated that businesses have seen revenue losses of between 30% and 80% as a result of the construction works and many have been forced to close down²⁷.

6.1.1.2 Mitigations

To mitigate the impacts of temporary construction works, stakeholder engagement should be undertaken to establish whether the impacts are critical to business operations. If possible, it is recommended that sites occupied by existing businesses should be avoided for construction works.

6.1.2 Temporary access impacts

Access to [REDACTED], is expected to be limited only on a small part of the car park. The impact to the business will therefore depend on how many car parks they can accommodate with this access restriction and the reliance their customers have on car parking. If a significant number of car parks are removed, customers may redirect their business to alternative locations or feel inconvenienced when visiting. However, it is difficult to estimate the value of this impact without information on sales and visitor frequencies.

[REDACTED] is expected to experience access impacts to their driveway and parts of a car park. Based on satellite images, the driveway seems to be the only point of entry or exit for the business, which will likely cause significant damage to the business and may mean they cannot operate. However, without an understanding of how critical that driveway and car park are to the success of their business it is difficult to assess the actual impact.

6.1.2.1 Mitigations

The Project should liaise with [REDACTED] to reduce any loss of business revenue caused by access restrictions. It is recommended that where possible, sites occupied by existing businesses should be avoided for construction works.

The BDP and other management plans required under the EMF will address access to existing business to ensure that impacts can be avoided, mitigated or managed.

6.1.3 Permanent impacts

Businesses within the areas identified for permanent works (shown in Appendix A) will need to relocate, resulting in jobs being lost or moved to a different area. In this section, the employment impact of permanently moving businesses from their current location has been calculated. Where businesses have permanent works that are assumed to critically impact on business operations, they have been included in this assessment as outlined in Appendix B. It should be noted that where permanent works do not intersect with the building proper, it has been assumed that the impact would not be critical to business operations.

While most businesses identified for permanent works are within the PAO (and therefore acquisition of these properties has been anticipated for over a decade) there are a discrete number of businesses outside of the PAO that should be of greatest concern. These businesses include [REDACTED]

²⁶ ACT Government (2018), Business Impact Assessment of ACT Government-led construction activities in Gungahlin

²⁷ <https://www.smartcompany.com.au/business-advice/legal/sydney-businesses-file-40-million-lawsuit-against-nsw-government-after-light-rail-construction-forces-business-closures/>

Where land is compulsorily acquired, the compensation regime under the MTPFA and LACA will be enlivened.

6.1.3.1 Potential employment impacts

Direct impacts

Employment within Sunshine North and Keilor would fall in conjunction with the reduction in land available for industrial activities resulting from permanent works for the Project. The direct FTE employment impact of relocating businesses has been assessed based on the estimated occupied floorspace and benchmark square metres per job as shown in Appendix C.

Indirect impacts

Indirect, or induced, employment impacts result from the linkages between different parts of the economy. For every direct job lost within an industry, there will be flow on jobs lost in many other industries. This includes decreases in employment due to a reduction in businesses supporting the supply chain (production induced employment impacts). It also includes the decrease in expenditure resulting from employees of relocated businesses spending their incomes elsewhere (consumption induced employment impacts). The Production and Consumption induced employment impacts have then been calculated by applying the relevant ABS Input-Output multipliers (also shown in Appendix C) to the direct employment figures.

The total employment impact is estimated by summing the direct and indirect (consumption and production induced) employment impacts as shown in Figure 6.1.



Figure 6.1: Input-Output modelling relationship

As displayed in Table 6.1, if **all** workers employed at businesses impacted by permanent works were to lose their jobs, based on the estimating technique used the total direct employment impact would be up to 232 FTE employees. In addition, there would be a production induced impact of up to 153 FTE employees and a consumption induced impact of up to 216 FTE employees.

Table 6.1: Potential employment impact of permanent works

Name of business	Estimated occupied floorspace (m2)	Estimated direct FTE employment	Production induced employment	Consumption induced employment	Total employment impact
Total	15,367	232	153	216	601

In general, however, a small business whose property is purchased at market value can be re-established in another location negating economic losses. Assuming that this occurs for all businesses with 25 or less employees, the employment impact is as shown in Table 6.2.

Table 6.2: Potential employment impact of permanent works – businesses with >25 employees

Name of business	Estimated occupied floorspace (m ²)	Estimated direct FTE employment	Production induced employment	Consumption induced employment	Total employment impact
Total	6,477	118	77	104	299

6.1.3.1.1 Mitigations

To mitigate the impacts of permanent works, a compensation regime could be developed to allow affected businesses to relocate without reducing their profitability. It is recommended that where possible, sites occupied by existing businesses should be avoided for permanent works.

6.1.3.2 Agglomeration effect

Agglomeration benefits arise from the scale or density of activity within a particular industry, mainly in the form of improved opportunities such as labour market pooling, the sharing of intermediate inputs and knowledge sharing. In Keilor, several transport-related industrial businesses congregate including

6.2 Indirect business impacts

Some businesses land will not be directly affected by the Project, but they may experience similar impacts that cause a loss of business revenue. The key reasons this may occur, and the possible impacts are explored below.

6.2.1 General construction impacts

During the construction phase, there will likely be indirect impacts on businesses in the vicinity of the Project that will affect how they operate. These impacts may include road network changes, noise, amenity impacts (such as dust or vibration), utility disruptions or roadblocks. Businesses impacted may experience similar revenue losses to those in explored in Section 6.1.1 due to the inconvenience it causes their customers to be nearby construction.

6.2.2 Parking limitations

The loss of parking spaces is potentially damaging to nearby businesses that rely on passing trade or businesses that don't have access to street parking. The car parks that will be impacted include the following:

The removal of car parks could increase competition and demand for the remaining spaces, potentially affecting parking convenience for customers and workers. This could result in some trade being redirected to alternative centres and employment locations, although it is difficult to estimate the value of this without information on sales and visitor frequencies.

For example, near Sunshine Station, there are a number of food businesses in [redacted] that likely rely on parking in Sunshine Station northern car park including [redacted]. By permanently removing car parks from the Sunshine Station northern car park, these businesses will potentially lose customers and business.

6.2.3 Mitigations

The Project will work with the businesses whose land will be directly impacted, and also other businesses in the general area that may be impacted by construction works or parking limitations. Stakeholder engagement should be undertaken to establish whether the impacts are critical to business operations.

Such impacts will be managed in accordance with the Project's EMF and EMRs.

6.3 Development site impacts

The former Darling Flour Mill development site is expected to experience business impacts during the construction phase due to the proximity to Project Land such as noise and dust. There will also be access restrictions and road blockages at peak construction times. These will be mitigated as described in the Traffic and Transport Assessment, and otherwise in accordance with the requirements of the Project's EMF and EMRs.

While development sites are relevant for the context of the Project, it is not expected there will be any direct business impacts on them. Considerations should be made for construction coordination including access, noise and amenity impacts, particularly with the sites that will also be under development during the same period (River Valley Estate).

6.3.1 Mitigations

The Project should liaise with developers of the sites to coordinate simultaneous construction works and minimise impacts. Stakeholder engagement should be undertaken to establish whether the impacts are critical to business operations.

The BDP and other management plans required under the EMF will address access to existing business to ensure that impacts can be avoided, mitigated or managed.

6.4 Opportunities

Assuming most employees will be sourced from the local region, the construction of the Project will generate employment for the region. With the region, and in particular Sunshine, Sunshine North and Ardeer – Albion, suffering from high unemployment (Section 5.1.1.5) and the COVID-19 pandemic, there is expected to be sufficient labour market capacity for the Project. In addition, the five SA2 areas have a range of businesses with capacity to provide services to the Project (Section 5.1.1.4).

At an estimated construction cost of around \$4.75 billion²⁸, over the project life there will be economic activity generated in the economy estimated at \$12.8 billion. Across the entire economy, a person-year of FTE employment is generated for every \$37k of initial investment in construction; thus, approximately 128,250 person-years of FTE employment will be created by the Project. This will be concentrated in the construction phase. These total figures include initial effects, production induced effects and consumption induced effects as shown in Table 6.3.

Table 6.3: Total construction impact on the economy

Type of impact	Initial effects	Production induced effects	Consumption induced effects	Total impact
Output (\$b)	\$4.75b	\$3.86b	\$4.19b	\$12.80b
Employment (FTE person-years)	47,500	38,000	42,750	128,250

There are also expected to be positive long-term impacts of the MAR on the regional economy; as railway stations and activity centres are utilised by a greater number of passengers, greater investment in the area will occur. It is difficult to assess the value of this impact without more information; however, employment and GRP would likely increase significantly for activity centres such as Sunshine and Albion.

²⁸ Provided by RPV

7. Stakeholder Engagement

7.1 Business engagement to date

Consultations with stakeholders has been ongoing since 2018. MAR was formally announced in November 2020, and community consultation for the Project intensifying shortly thereafter.

A project-wide newsletter was distributed in January 2021 to provide information on the Project, with a virtual information session and online survey promoted to ensure local businesses and communities could learn more and have their say on the Project. Following the announcement in November 2020, there was a virtual briefing to over 100 key stakeholders providing them with an overview of the project and key elements of scope. Throughout 2021 there have been ongoing technical workshops with councils, utility providers and interfacing government agencies. Engagement also occurred with PAO landowners and tenants in June and non-PAO landowners and tenants in early September - these conversations are on-going to manage interfaces and mitigate impacts.

Local businesses were identified along the rail corridor and in the local precincts that are expected to be most impacted by construction and future operations of the Project.

Initial engagement included door knocking more than 120 local businesses between Sunshine and Airport West to raise awareness and gauge any concerns they may have about the Project, and to offer ways in which the project team could work with them going forward.

The project team has also been in contact with businesses in Sunshine and other key locations on Project land to inform them of site investigations happening near or on their property as part of planning and design work for the Project.

Communication and engagement will be ongoing with businesses throughout all phases of the Melbourne Airport Rail project.

7.1.1 Commercial land impacts

In November 2020, Rail Projects Victoria (RPV) commenced engagement with properties identified as being within the PAO, an area of land that was set aside for a future rail link to Melbourne Airport in 2005. Letters were sent to these properties in November 2020 and January 2021 introducing RPV, explaining that reserved land may need to be acquired for the Project, and inviting landowners and tenants to contact RPV if they had any questions or concerns.

Since this initial engagement commenced, RPV has responded to numerous requests from landowners and tenants seeking information on when properties would be acquired.

Clarifications were available from June 2021, once RPV's project teams had a better understanding of how much land would be required and the approximate timing. An engagement program was developed outlining how landowners and tenants would be engaged. On Thursday, 24 June 2021, RPV:

- Phoned landowners and tenants (where tenant details were available) to confirm the area of land required and when it may be required, to provide contact details for case managers, and to offer a follow up meeting with RPV and DoT property to discuss the next steps in greater detail.
- Sent emails immediately post the conversations with landowners and tenants, containing a letter, a land map relevant to the property, and relevant fact sheets. This information was also mailed out in an express post envelope on the same day.
- Where tenant details were not known, nor provided by the landowner, an express post envelope was sent to them containing a letter, a land map relevant to the property and relevant fact sheets.

Subsequent engagement has taken place with RPV meeting and exchanging further information with landowners and tenants on project requirements, the land acquisition process and business support that may be available.

RPV expects that further commercial land will be required outside of land covered by the PAO. Engagement with landowners and tenants on land required for the Project that is not covered by the PAO commenced in early September 2021.

7.1.2 Summary of landowner and tenant discussions to date for PAO properties

Landowners and tenants have submitted various queries and feedback to RPV. These include:

- Interest in understanding the timing for acquisition.
- Concerns about where an occupier will be able to relocate to in the future.
- Concerns that a property may become land-locked.
- Queries about what land RPV may require for site laydown purposes.
- Requests for more detail on what infrastructure will be constructed on a property.
- Requests for more detail on the Project, including design drawings and how the Project interfaces with future developments.
- Queries about potential commercial arrangements to lease the remainder of a property for a site compound.
- A number of the discussions to date have been directly relevant to business interests. These include:
 - > Pleased to have Project timing confirmed and will start planning accordingly.
 - > Aware of the process and that there is a need for the property being required for the Project under the PAO.
 - > Queries as to how the Project interfaces with future development and concerns that MAR may hinder their future development plans.

7.2 Relevant Stakeholders

In addition to business engagement, RPV has engaged with a variety of stakeholders that are representative of businesses who may be directly or indirectly impacted by the Project. These stakeholders are outlined in Table 7.1.

Table 7.1: Relevant stakeholders

Stakeholder name	Relevance to the Project
Brimbank City Council	Brimbank City Council represents businesses and residents abutting the Project area in Sunshine, Albion, Sunshine North, Keilor Park and part of Tullamarine. Brimbank has its own strategies and plans for economic development, employment and transport within the municipality, and can assist by assessing opportunities, risks and other impacts that the Project presents for businesses identified in this report.
Moonee Valley City Council	Moonee Valley City Council represents businesses and residents abutting the Project area in Keilor East and Airport West. Moonee Valley has its own strategies and plans for economic development, employment and transport within the municipality, and can assist by assessing opportunities, risks and other impacts that the Project presents for businesses identified in this report.
Hume City Council	Hume City Council represents businesses and residents abutting the Project area in part of Tullamarine and at Melbourne Airport. Hume has its own strategies and plans for economic development, employment and transport within the municipality, and can assist by assessing opportunities, risks and other impacts that the Project presents for businesses identified in this report.
Sunshine Business Association (SBA)	SBA represents over 400 businesses in the Sunshine Town Centre and surrounding area. The Association can provide commentary on general risks and opportunities for businesses in the Sunshine area.
Western Melbourne Tourism (WMT)	The WMT committee is a representative group of western regional councils, tourism industry, set up to advocate, coordinate and promote events and industry development for tourism in the

Stakeholder name	Relevance to the Project
	western metro region. WMT can share views on the tourism risks and opportunities that the Project will bring to the western region.
LeadWest	The LeadWest advisory committee was established by the Cities of Brimbank, Hobsons Bay, Maribyrnong, Melton, Moonee Valley and Wyndham to advocate for secure sustainable economic development and maximise community benefits in Melbourne's West. LeadWest can identify opportunities for the Project to create local jobs and improve the liveability and sustainability of Melbourne's West.
West of Melbourne Economic Development Alliance (WoMEDA)	WoMEDA was established to influence new economic development opportunities and create more local jobs in the West of Melbourne. The independent board focuses on the six Councils that work through LeadWest. WoMEDA can provide views on how the Victorian Government can leverage opportunities or mitigate impacts of the Project.
List of businesses identified in Appendix B	Ongoing communications and engagement with businesses located on land identified for works will enable the Project to better understand impacts to their business operations. For sites where a business could not be identified, the current use should be established.

Key areas of interest from the above-named stakeholders include:

- 1) Land acquisition and construction impacts on businesses.
- 2) Connecting tourists to events and tourism destinations in Melbourne's west.
- 3) Unlocking potential developments in areas around the Project to create local jobs and stimulate other economic opportunities.
- 4) Opportunities for new or enhanced railway stations as part of the Project to improve access to jobs at Melbourne Airport and across Melbourne's west.
- 5) Creating jobs in the construction industry.

Further stakeholder engagement will be undertaken to better understand business impacts based on the findings from the regional economy baseline, relevant specialist reports and this impact assessment.

The RPV communications and stakeholder engagement team will continue to have responsibility for engaging with relevant stakeholders. It is recommended that the outcomes of any further engagement are incorporated into the management approach for affected parties through the BDP or other relevant plans.

8. Environment Effects Act 1978 Self-Assessment

The *Environment Effects Act 1978* (EE Act) is relevant to the Project as it provides for the assessment of proposed projects that may have a significant effect on the environment. The *Ministerial Guidelines for Assessment of Environmental Effects* (the Ministerial Guidelines) under the EE Act provide the criteria used to determine whether the project warrants referral to the Minister for Planning. A project proponent is responsible for assessing whether its project will have potential adverse environmental effects that could be significant in a regional or State context.

The relevant criterion for this Impact Assessment is:

- Potential extensive or major effects on social or economic well-being due to direct or indirect displacement of non-residential land use activities.

This Impact Assessment examines the 'economic well-being' part of this criterion, the 'social' aspect being addressed by other specialists.

While the threshold for 'extensive or major effects' is not defined in the Ministerial Guidelines, given the relatively small number of businesses and employees impacted by permanent acquisition and the corresponding economic impact, this Impact Assessment finds that the effects on economic well-being from direct displacement of non-residential land use activities are not of regional or State significance:

- The majority of business to be impacted in Keilor Park and Tullamarine are already affected by a PAO, signalling a clear intent for these land parcels to be acquired for the purposes of a rail link to the Airport.
- Business impacted by temporary or permanent works and displaced as a result of project works will have access to a statutory compensation regime that provides the ability to claim compensation for business disruption (amongst other matters) as a natural, direct and reasonable consequence of the occupation or acquisition of land
- While several businesses may be impacted during the construction period, sites will be reinstated at the completion of works and any residual impacts will be managed in accordance with the Project's EMF and EMRs.
- Ongoing impacts on business during MAR operations are assessed to be negligible.

Noting the limitations of the data available, the report concludes that indirect displacement of economic activities is also below the level of regional or State significance.

Any additional findings of stakeholder engagement in this respect should be accounted for in the BDP or other relevant plans.

9. Conclusion

This report presents an assessment of the business impacts of the MAR Project. The Project would connect Melbourne Airport Precinct with a rail service for the first time.

Learnings from historical data indicated that the region employs most people within the manufacturing industry and construction accounts for the greatest number of businesses. In addition, the Brimbank City Council has several strategies in place to improve connectivity and promote investment and economic development in the region, which is an opportunity of the Project.

The location of Project works is expected to affect businesses. Permanent works will require around 16 businesses, directly employing around 232 people, to relocate or close operations and further supply chain impacts on top of this. Some of the smaller businesses are likely to be able to relocate, however, at least three businesses, without appropriate support, would be impacted significantly. Temporary and access works will likely result in a loss of revenue to at least eight businesses, with possible losses expected over 30%. Development sites and other businesses in the vicinity of the Project may be affected by construction works such as road network changes, noise, amenity impacts, utility disruptions or roadblocks. They may also be impacted longer term by parking limitations.

There is potential to limit the business and employment impacts by reducing the land area located on sites that are already occupied by businesses. Landowners who are likely to be affected by the proposed works should be consulted to ensure that impacts are minimised.

The Project will provide opportunities for employment and economic activity during the construction phase, with approximately 128,250 person-years of FTE employment and \$12.8 billion output across the Victorian economy generated based on the construction cost of \$4.75 billion. A rail link to the airport will also likely result in long term investment in the area, and associated increase in jobs and economic activity.

Ongoing stakeholder engagement is required to accurately identify the businesses that will incur a loss of revenue or footfall or need to permanently relocate. This will allow the estimated dollar value of impact to be fully assessed and understand whether businesses can continue to operate. Additionally, local councils can provide views on risks and opportunities of the Project. The RPV communications and stakeholder engagement team would be responsible for carrying out this task. Engagement to date is ongoing and has been limited to businesses within the PAO that are directly impacted by the Project. The outcomes of any further engagement will be incorporated into the management approach for affected parties through the BDP or other relevant plans.

With regard to the EE Act Self-Assessment criteria, this Impact Assessment gives the preliminary conclusion that the effects on economic well-being from direct and indirect displacement of non-residential land use activities are not of regional or State significance.

Any additional findings of stakeholder engagement in this respect should be accounted for in the BDP or other relevant plans.

APPENDIX A LAND IDENTIFIED FOR PROJECT

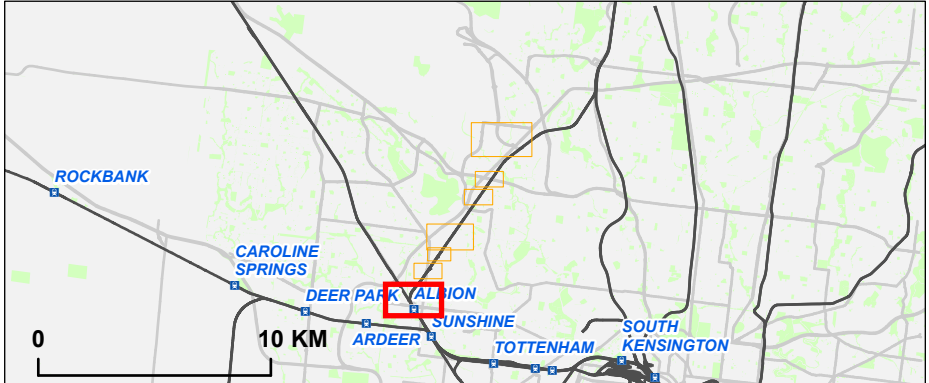




- Rail station
 - VicTrack Reserve Boundary
 - State Land Impact Assessment Area
- Potential Impact on Identified Businesses**
- Permanent Works
 - Temporary Occupation

Map 1 of 7

Data Sources:
AJMJV 2021
VicTrack 2021
Vicmap 2021
Aerial photo: DELWP Apr. 2021



Melbourne Airport Rail
Project Wide
Business Impact Assessment

Drawing Number:		Revision:	
MAR-AJM-PWD-PWD-MAP-XLP-MMN-0490704		A.2	
Drawn By:	Approved By:	Date:	Map Size:
R. Bernardo	M. Pisasale	27/09/2021	A3

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Metres
Coordinate System: GDA 1994 MGA Zone 55



--- VicTrack Reserve Boundary
 State Land Impact Assessment Area
Potential Impact on Identified Businesses
 Permanent Works

Map 2 of 7

Data Sources:
 AJMJV 2021
 VicTrack 2021
 Vicmap 2021
 Aerial photo: DELWP Apr. 2021

Melbourne Airport Rail
Project Wide

Business Impact Assessment

Drawing Number: MAR-AJM-PWD-PWD-MAP-XLP-MMN-0490704

Revision: A.2

Drawn By: R. Bernardo	Approved By: M. Pisasale	Date: 27/09/2021	Map Size: A3
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Coordinate System: GDA 1994 MGA Zone 55



VicTrack Reserve Boundary

State Land Impact Assessment Area

Potential Impact on Identified Businesses

Temporary Occupation

Map 3 of 7

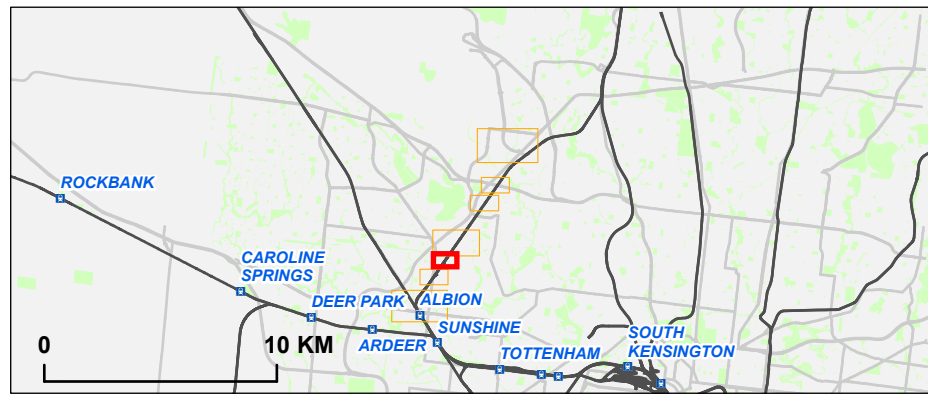
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AJMJV 2021

VicTrack 2021

Vicmap 2021

Aerial photo: DELWP Apr. 2021



RAIL PROJECTS VICTORIA

AJM

Joint Venture

aurecon

JACOBS

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MOTT MACDONALD

Melbourne Airport Rail

Project Wide

Business Impact Assessment

Drawing Number:

MAR-AJM-PWD-PWD-MAP-XLP-MMN-0490704

Revision:

A.2

Drawn By:

R. Bernardo

Approved By:

M. Pisasale

Date:

27/09/2021

Map Size:

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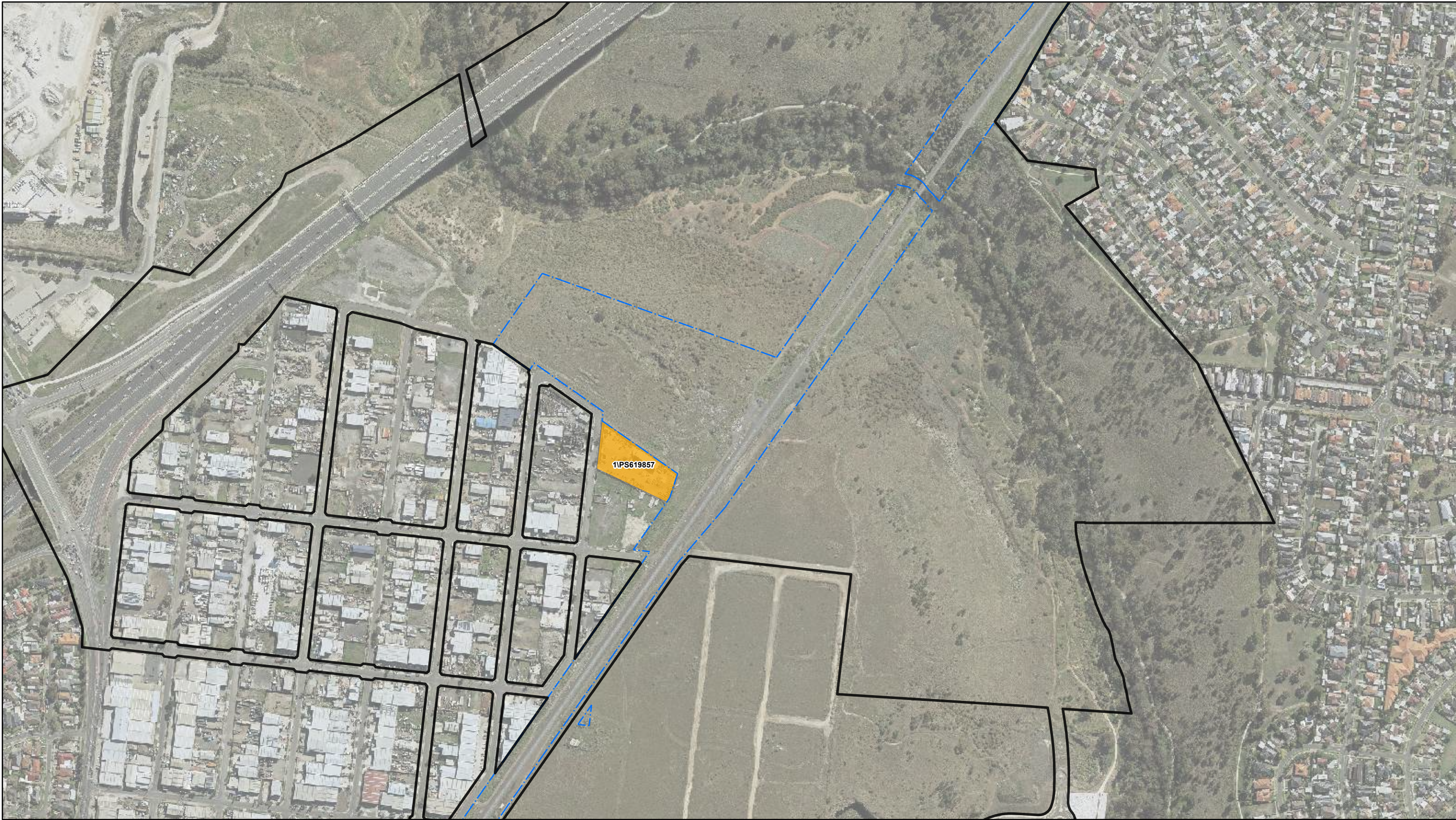
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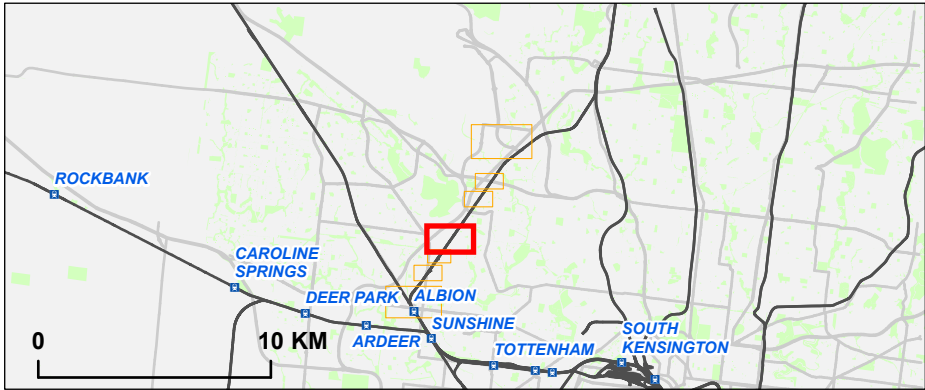
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Map 4 of 7

- VicTrack Reserve Boundary
State Land Impact Assessment Area
- Potential Impact on Identified Businesses**
- Temporary Occupation

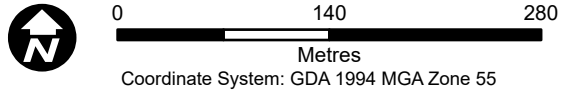
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Vicmap 2021
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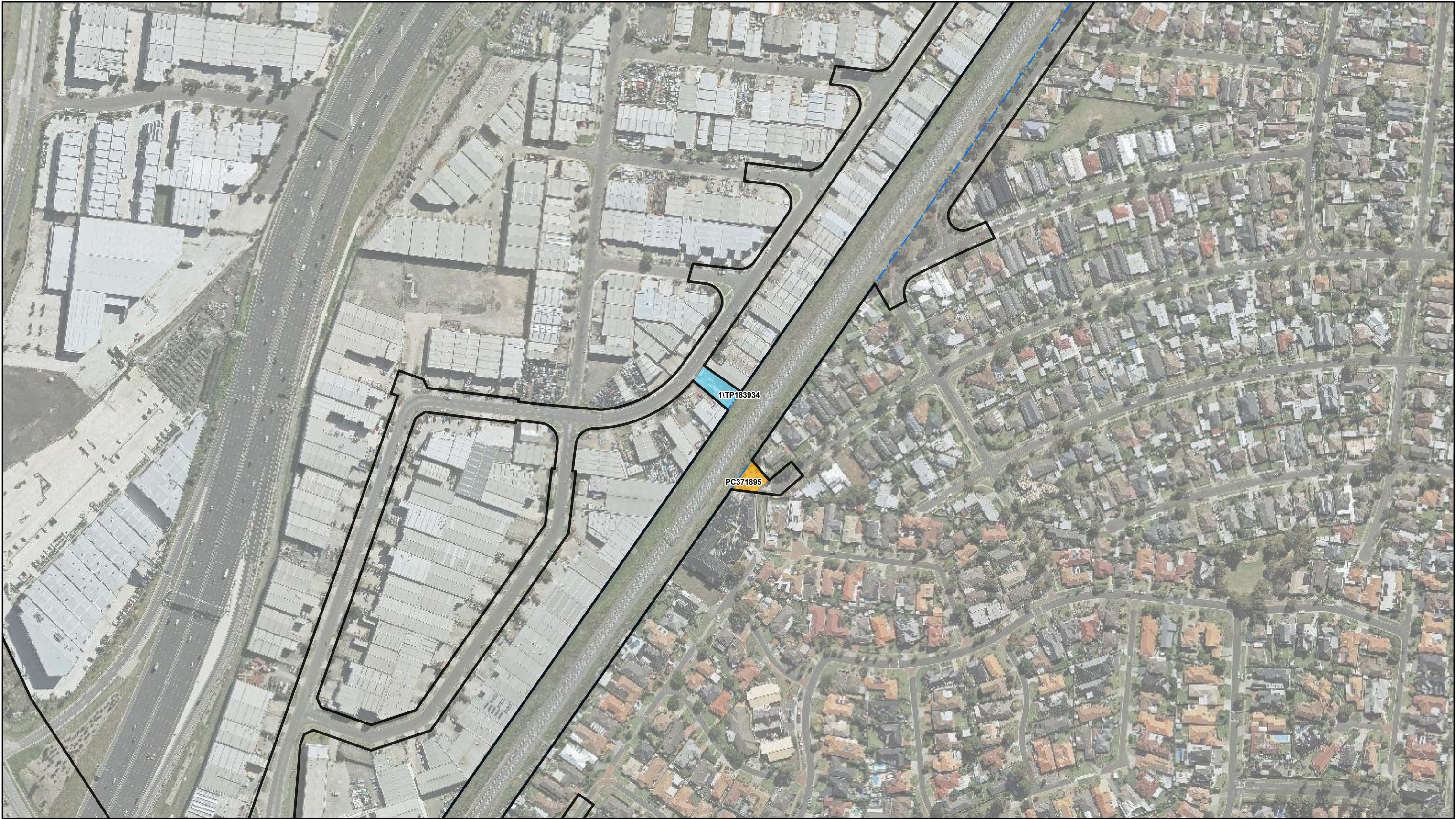


**Melbourne Airport Rail
Project Wide**

Business Impact Assessment

Drawing Number:		Revision:	
MAR-AJM-PWD-PWD-MAP-XLP-MMN-0490704		A.2	
Drawn By:	Approved By:	Date:	Map Size:
R. Bernardo	M. Pisasale	27/09/2021	A3





--- VicTrack Reserve Boundary
 State Land Impact Assessment Area

Potential Impact on Identified Businesses

Permanent Works
 Temporary Occupation

Map 5 of 7

Data Sources:
 AJMJV 2021
 VicTrack 2021
 Vicmap 2021
 Aerial photo: DELWP Apr. 2021

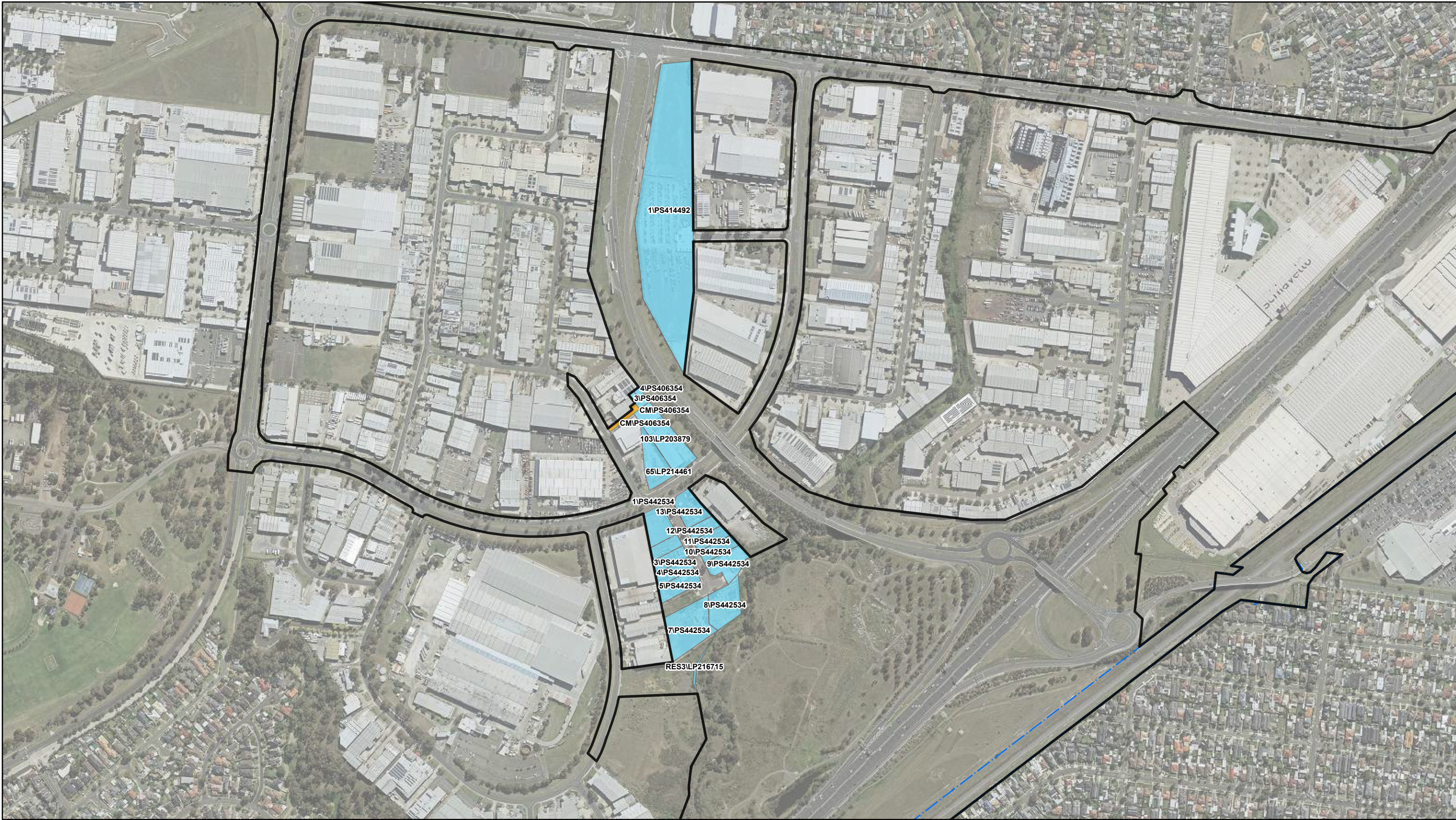
Melbourne Airport Rail
Project Wide
 Business Impact Assessment

Drawing Number:		Revision:	
MAR-AJM-PWD-PWD-MAP-XLP-MMN-0490704		A.2	
Drawn By:	Approved By:	Date:	Map Size:
R. Bernardo	M. Pisasale	27/09/2021	A3

0 80 160

Metres

Coordinate System: GDA 1994 MGA Zone 55



--- VicTrack Reserve Boundary

State Land Impact Assessment Area

Potential Impact on Identified Businesses

Permanent Works

Temporary Occupation

Map 7 of 7

Data Sources:
AJMV 2021
VicTrack 2021
Vicmap 2021
Aerial photo: DELWP Apr. 2021

Melbourne Airport Rail
Project Wide

Business Impact Assessment

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Coordinate System: GDA 1994 MGA Zone 55

APPENDIX B

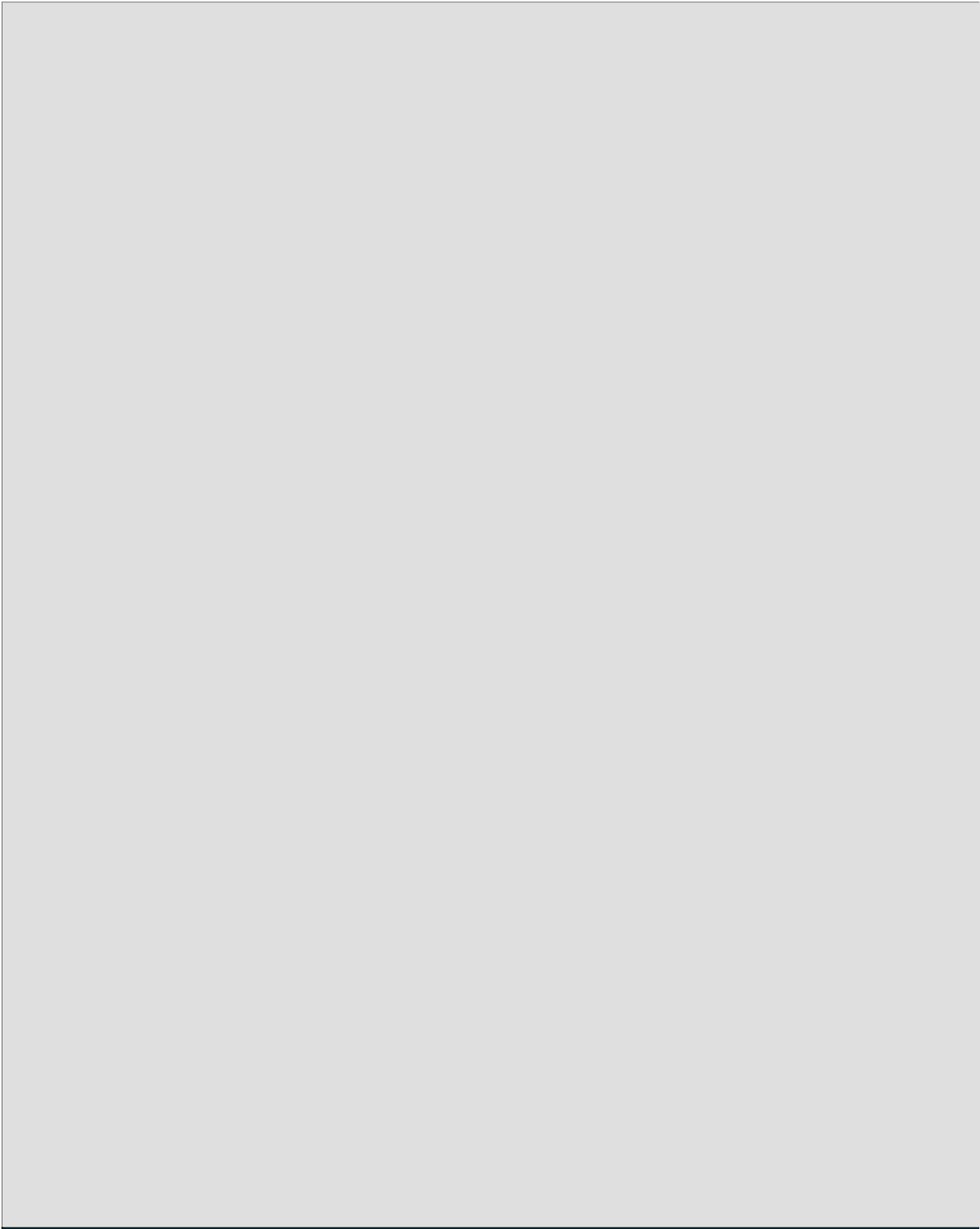
LIST OF ADDRESSES IMPACTED





Table B-1: List of businesses identified

PAO / non-PAO	Address	Land occupation





APPENDIX C

DATA SOURCES USED TO ESTIMATE IMPACT





Table C-1: Benchmark square metres per job

Industry	Benchmark (sqm/job)
Agriculture, Forestry & Fishing	95
Mining	95
Manufacturing	120
Electricity, Gas Water and Waste Services	90
Construction	70
Wholesale Trade	100
Retail Trade	45
Accommodation and Food Services	35
Transport, Postal and Warehousing	100
Information Media and Communication	35
Financial and Insurance Services	35
Rental, Hiring and Real Estate Services	35
Professional, Scientific and Technical Services	35
Administrative and Support Services	35
Public administration and safety	60
Education and Training	70
Health Care and Social assistance	70
Arts and Recreation	35
Other Services	35

Source: Urban Enterprise 2016, Knox Land for Business, Knox City Council

TABLE 1. OUTPUT MULTIPLIERS, DIRECT ALLOCATION OF COMPETING IMPORTS, 1989-90

<i>Industry</i>	<i>Initial Effects</i>	<i>First Round Effects</i>	<i>Industrial Support Effects</i>	<i>Production Induced Effects</i>	<i>Consumption Induced Effects</i>	<i>Simple Multi- pliers</i>	<i>Total Multi- pliers</i>	<i>Type 1A Multi- pliers</i>	<i>Type 1B Multi- pliers</i>	<i>Type 2A Multi- pliers</i>	<i>Type 2B Multi- pliers</i>
1 Agriculture	1.000	0.376	0.273	0.649	0.529	1.649	2.178	1.376	1.649	2.178	1.178
2 Forestry, fishing, hunting	1.000	0.329	0.255	0.584	0.901	1.584	2.485	1.329	1.584	2.485	1.485
3 Mining	1.000	0.327	0.213	0.540	0.596	1.540	2.136	1.327	1.540	2.136	1.136
4 Meat and milk products	1.000	0.752	0.544	1.296	0.712	2.296	3.008	1.752	2.296	3.008	2.008
5 Food products nec	1.000	0.616	0.491	1.107	0.819	2.107	2.926	1.616	2.107	2.926	1.926
6 Beverages, tobacco products	1.000	0.530	0.409	0.939	0.690	1.939	2.629	1.530	1.939	2.629	1.629
7 Textiles	1.000	0.553	0.414	0.967	0.811	1.967	2.778	1.553	1.967	2.778	1.778
8 Clothing and footwear	1.000	0.446	0.338	0.784	0.965	1.784	2.749	1.446	1.784	2.749	1.749
9 Wood, wood products etc	1.000	0.507	0.388	0.895	0.982	1.895	2.877	1.507	1.895	2.877	1.877
10 Paper, printing etc	1.000	0.417	0.277	0.694	0.901	1.694	2.595	1.417	1.694	2.595	1.595
11 Chemicals	1.000	0.501	0.382	0.883	0.714	1.883	2.597	1.501	1.883	2.597	1.597
12 Petroleum and coal products	1.000	0.604	0.361	0.965	0.473	1.965	2.438	1.604	1.965	2.438	1.438
13 Non-metallic min. products	1.000	0.500	0.344	0.844	0.786	1.844	2.630	1.500	1.844	2.630	1.630
14 Basic metals and products	1.000	0.570	0.426	0.996	0.646	1.996	2.642	1.570	1.996	2.642	1.642
15 Fabricated metal products	1.000	0.548	0.472	1.020	0.891	2.020	2.911	1.548	2.020	2.911	1.911
16 Transport equipment	1.000	0.440	0.345	0.785	0.769	1.785	2.554	1.440	1.785	2.554	1.554
17 Machinery etc nec	1.000	0.432	0.336	0.768	0.881	1.768	2.649	1.432	1.768	2.649	1.649
18 Miscell. manufacturing	1.000	0.458	0.344	0.802	0.839	1.802	2.641	1.458	1.802	2.641	1.641
19 Electricity, gas, water	1.000	0.448	0.298	0.746	0.640	1.746	2.386	1.448	1.746	2.386	1.386
20 Construction	1.000	0.459	0.354	0.813	0.881	1.813	2.694	1.459	1.813	2.694	1.694
21 Wholesale, retail trade	1.000	0.363	0.217	0.580	1.076	1.580	2.656	1.363	1.580	2.656	1.656
22 Repairs	1.000	0.290	0.202	0.492	1.057	1.492	2.549	1.290	1.492	2.549	1.549
23 Transport, communication	1.000	0.343	0.230	0.573	0.890	1.573	2.463	1.343	1.573	2.463	1.463
24 Finance, property etc	1.000	0.323	0.192	0.515	1.096	1.515	2.611	1.323	1.515	2.611	1.611
25 Ownership of dwellings	1.000	0.217	0.146	0.363	0.195	1.363	1.558	1.217	1.363	1.558	0.558
26 Public admin., defence	1.000	0.523	0.385	0.908	1.325	1.908	3.233	1.523	1.908	3.233	2.233
27 Community Services	1.000	0.223	0.144	0.367	1.616	1.367	2.983	1.223	1.367	2.983	1.983
28 Recreational etc services	1.000	0.424	0.297	0.721	1.041	1.721	2.762	1.424	1.721	2.762	1.762

Figure C-1: ABS output multipliers, 1989-90

TABLE 3. EMPLOYMENT (FULL-TIME EQUIVALENT) MULTIPLIERS, DIRECT ALLOCATION OF COMPETING IMPORTS, 1989-90

<i>Industry</i>	<i>Initial Effects</i>	<i>First Round Effects</i>	<i>Industrial Support Effects</i>	<i>Production Induced Effects</i>	<i>Consumption Induced Effects</i>	<i>Simple Multi- pliers</i>	<i>Total Multi- pliers</i>	<i>Type 1A Multi- pliers</i>	<i>Type 1B Multi- pliers</i>	<i>Type 2A Multi- pliers</i>	<i>Type 2B Multi- pliers</i>
1 Agriculture	15	4	3	7	6	22	27	1.266	1.446	1.828	0.828
2 Forestry, fishing, hunting	11	3	2	6	10	16	26	1.289	1.516	2.424	1.424
3 Mining	4	3	2	5	6	9	15	1.753	2.276	3.977	2.977
4 Meat and milk products	5	10	6	16	8	20	28	3.082	4.301	5.922	4.922
5 Food products nec	6	7	5	12	9	18	26	2.105	2.955	4.427	3.427
6 Beverages, tobacco products	5	6	4	10	7	14	22	2.250	3.124	4.760	3.760
7 Textiles	7	6	4	10	9	17	26	1.907	2.550	3.858	2.858
8 Clothing and footwear	15	5	4	9	10	24	34	1.353	1.597	2.301	1.301
9 Wood, wood products etc	13	6	4	10	11	23	34	1.446	1.738	2.528	1.528
10 Paper, printing etc	9	5	3	7	10	16	26	1.505	1.820	2.903	1.903
11 Chemicals	5	4	4	8	8	13	20	1.968	2.761	4.441	3.441
12 Petroleum and coal products	1	3	3	7	5	8	13	5.249	9.304	15.595	14.595
13 Non-metallic min. products	7	4	3	7	8	14	23	1.609	2.065	3.307	2.307
14 Basic metals and products	3	3	3	7	7	10	17	1.922	2.885	4.887	3.887
15 Fabricated metal products	9	4	4	8	10	17	27	1.472	1.878	2.922	1.922
16 Transport equipment	7	4	3	7	8	14	23	1.570	1.991	3.128	2.128
17 Machinery etc nec	10	4	3	7	9	17	26	1.429	1.731	2.720	1.720
18 Miscell. manufacturing	10	4	3	8	9	18	27	1.423	1.744	2.614	1.614
19 Electricity, gas, water	5	3	2	5	7	10	17	1.567	2.065	3.476	2.476
20 Construction	10	5	3	8	9	18	27	1.457	1.781	2.727	1.727
21 Wholesale, retail trade	17	4	2	6	12	24	35	1.238	1.367	2.036	1.036
22 Repairs	17	3	2	5	11	22	34	1.180	1.293	1.954	0.954
23 Transport, communication	11	4	2	6	10	17	26	1.337	1.541	2.429	1.429
24 Finance, property etc	12	4	2	6	12	17	29	1.312	1.480	2.491	1.491
25 Ownership of dwellings	-	2	1	3	2	3	5	-	-	-	-
26 Public admin., defence	12	6	4	10	14	21	36	1.475	1.798	2.995	1.995
27 Community Services	21	3	1	4	17	25	42	1.122	1.191	2.020	1.020
28 Recreational etc services	17	5	3	8	11	24	36	1.290	1.476	2.153	1.153

Figure C-2: ABS Employment multipliers, 1989-90



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