Universities and success for Greater Parramatta and Olympic Peninsula

How heightened collaboration and committed investment can realise NSW’s largest, near-term growth opportunity
Map of Greater Parramatta and Olympic Peninsula

KEY
- GPOP
- Parramatta River
- Parks
- Metro
- Light rail
- Cycle way
- Train
- WestConnex / M4 Motorway
- Main roads
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For decades, the University of Sydney and Western Sydney University have been central contributors to Western Sydney and the Greater Parramatta and Olympic Peninsula (GPOP) region.

The University of Sydney has had a significant presence in Western Sydney for 80 years. The University has committed to investing $500 million by 2030 to develop the Westmead Health and Education Precinct as the core of what will be its second comprehensive campus, and is in the process of significantly expanding its teaching and research presence in the region. This will be the University of Sydney’s largest investment outside its Camperdown campus, and will firmly ground its internationally ranked research capabilities in GPOP.

Since its inception, Western Sydney University has been a major contributor to the region, with five campuses in the GPOP area alone. In recent years, Western Sydney University has invested more than $700 million in expanding its local presence, particularly through the Westmead Health and Education Precinct, the Peter Shergold building in Parramatta Square, and the upcoming Engineering Innovation Hub in Hassall St, Parramatta with UNSW Sydney. This complements a comprehensive presence across Western Sydney, including campuses in Bankstown, Liverpool, Campbelltown, Hawkesbury, Penrith and Blacktown.

Both our universities are committed to the success of GPOP. We are transformative anchor institutions for the region, pivotal to local and national prosperity in a strategically critical part of Greater Sydney. We are working together to help GPOP reach its great potential.

This paper highlights the outstanding commitments and investments that have already been made in support of the GPOP region. They include all levels of government, businesses, the hospitals, other educational institutions and the local community. It illustrates the scale of the opportunity at GPOP, underlining the importance of continued investment, policy support and consistency.

While there is much to be proud of, our view is that there is more to do. Continued focus is required from government and leaders across the region. This paper presents our view on what is needed to realise GPOP’s extraordinary potential.

The paper also serves as a clear signal that we want to collaborate with other leaders, across government, industry and community. There are important decisions to make, and we want to contribute.

We look forward to working with you.
Executive summary: making the decision of the century

The Greater Parramatta and Olympic Peninsula (GPOP) region is experiencing tremendous growth through the commitment of governments and anchor institutions like Western Sydney University and the University of Sydney. However, sustained focus is necessary to achieve the true potential of GPOP. How large that opportunity is, and how soon it is realised, will be determined by the collaborative focus from governments, institutions, local industry and community leaders. For this reason, the time to invest in GPOP is now.

GPOP is one of the biggest near-term growth opportunities in Australia

GPOP has developed beyond expectations in recent years, due mainly to significant contributions by governments, universities and businesses. It has the potential to grow even further, driven by three key characteristics:

1. **GPOP’s centrality**

As the geographic and demographic centre of Sydney and core of the Greater Sydney Commission’s, Metropolis of Three Cities, GPOP will play an important role in connecting all parts of Sydney. GPOP will be the gateway that links the Western Parkland City and the Eastern Harbour City, serving as an important enabler of the future development to occur in the Western Parkland City. Work is already underway to unlock GPOP’s potential as Sydney’s ‘Central River City’.

Capitalising on GPOP’s growth opportunities will realise the Three Cities plan, setting the foundation for the success of the Western Parkland City, and presenting the opportunity to become the cultural and economic core of the much larger city that Sydney is becoming.

2. **GPOP’s universities**

An educated population is another important enabler of future growth as it sets up the region for high value jobs. While many universities are investing in Western Sydney, Western Sydney University and the University of Sydney have made the largest investments in GPOP. This is based on decades long presence in the region, and the willingness of these two institutions to leverage the full capacity of their broader capabilities. These investments have provided world-class education and research for the region, and both universities are expanding their investments in the region. Collaboration between the universities brings unique and transformational educational, engagement and capability development opportunities to GPOP.

The Westmead Health and Education Precinct is particularly important as it can differentiate GPOP on the global scale, attracting globally competitive talent and jobs. This precinct alone currently produces $1.9 billion of economic output, expected to increase to $2.8 billion by 2036.

3. **GPOP’s human and economic potential**

GPOP is on its way to becoming Greater Sydney’s economic catalyst, through the uplift provided by Westmead, Parramatta Central Business District (CBD) and Olympic Park. The region has a young, diverse and educated workforce, which leverages a broad international network to innovate more effectively.

Parramatta is forecast to almost double its economic growth rate from 2.4 per cent to 4.6 per cent in the next three years, and to create more than 150,000 new jobs by 2036. The Central River City has 70 per cent more forecast population growth than the Eastern Harbour City. This growth potential will be realised much sooner than other developing areas of Sydney.

4. **The time to invest in GPOP is now**

GPOP collaborators are making the decisions of the century. The region’s potential is high, but it needs a strong foundation to achieve its promise. Many parts of the foundation are in place, but not all. With appropriate focus, GPOP can realise its potential as the biggest, near-term growth opportunity in Australia.

A GPOP growth scorecard

This paper evaluates GPOP along seven dimensions that make up an effective foundation for growth. These dimensions are adapted from the NSW Innovation and Productivity Council’s work on NSW Innovation Precincts. All Dimensions must be addressed to develop a region successfully.

1. **Transport infrastructure** is mostly on track due to the significant investments of the NSW Government.

2. **Economic fundamentals** are strong, as more organisations and businesses move to GPOP, and developers and planners seek to enable them.

3. **Local built infrastructure** is not where it needs to be. GPOP needs more walkable precincts and active transport corridors to encourage social interaction and economic collaboration. It does not yet effectively cater for start-up communities.

4. **Amenity and quality of life** are improving but still not where they need to be. More work is needed to ensure that the region attracts and retains talent.

5. **Skill formation** in GPOP is strong, based on the significant investments from the University of Sydney and Western Sydney University.

6. **Collaboration and governance**, if improved across the whole of GPOP, could provide a shared vision for the future, supporting business attraction.

7. **Research and development** is strong and growing in the region, while more needs to be done to strengthen commercialisation. This requires new approaches to attract and engage a wider range of private companies.
**GPOP is Sydney’s true centre**

**GPOP is a historically significant region**

Originally, the region was home to the Burramattagal (meaning: place where the eels lie down to breed) people of the Darug clan who occupied present day Parramatta and its surrounding area for over 60,000 years. The Burramattagal people have never ceased to call this region home.

The GPOP region looms large in modern Australian history, playing a crucial part of the development of Sydney and the nation. It covers 4,000 hectares, stretching 13km across from Strathfield to Westmead and 7km up from Carlingford to Lidcombe and Granville.

The demographic centre of Sydney has moved west as the city has grown, as shown in the map to the right. For almost 60 years, the demographic centre has been in, or near, GPOP. In 1961 it was in North Strathfield, and in 2016 it was in Granville. This shows how central GPOP is to modern Sydney.

Universities have been crucial to the development of the GPOP region.

Since its inception in 1989, Western Sydney University has been an anchor institution for the region, driven by a vision of securing success for its students and the Western Sydney region. Through its campuses in Rydalmere and the Parramatta CBD, it has provided high quality education for the Western Sydney community. It is one of the largest employers in the region, and is an important advocate for GPOP and Western Sydney more broadly.

The University of Sydney has been present in Western Sydney since 1936, continually expanding its reach and impact on the Western Sydney community. Within GPOP, the University of Sydney was instrumental in the development of Westmead Hospital, and has been a strong presence in the area for over 40 years. This now includes over 1,000 staff, affiliated clinicians and researchers, and is set to expand even further.

**Sydney’s demographic centre over time**

<table>
<thead>
<tr>
<th>Year</th>
<th>Suburb</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1933</td>
<td>Five Dock</td>
<td>1.3m</td>
</tr>
<tr>
<td>1911</td>
<td>Rodd Point</td>
<td>0.7m</td>
</tr>
<tr>
<td>1961</td>
<td>North Strathfield</td>
<td>2.3m</td>
</tr>
<tr>
<td>1986</td>
<td>Auburn</td>
<td>3.3m</td>
</tr>
<tr>
<td>2016</td>
<td>Granville</td>
<td>4.7m</td>
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Greater Metropolitan Sydney will be ‘Three Cities’

The Greater Sydney Commission’s (GSC), Metropolis of Three Cities establishes a 40-year vision (to 2056) for Greater Sydney, with a 20-year plan to manage growth and change. This will provide a sustainable solution to accommodate Greater Sydney’s forecast population growth through three connected, liveable, productive and sustainable cities; the Western Parkland City, the Central River City and the Eastern Harbour City. The vision is centred on enabling Greater Sydney residents to live within 30 minutes of their job, education, health and recreation facilities.

The Central River City covers the areas of Blacktown, Cumberland, Parramatta and the Hills local government areas. As the geographic link between the Eastern and Western cities, the city will be a lynchpin of travel across Sydney, and the key enabler of the 30-minute city. Transport infrastructure such as the Sydney Metro network and the Parramatta Light Rail are fundamental to realising this aspiration.

As Sydney’s second city, the Central River City is the largest and nearest growth opportunity in NSW. It will be the fastest growing Sydney district over the next 20 years. Projections show demand for an additional 207,500 dwellings in the area.

Major infrastructure investments in education and health are already underway in preparation for the boom. As vital institutions, the University of Sydney and Western Sydney University are leading innovation in the region, building on their existing presence in Western Sydney through long-term investment in education, health and culture.

GPOP is the core of this vision and will experience the most growth

GPOP’s location provides key economic advantages. With the right transport connections and investment, it can easily attract people from all parts of Greater Sydney — to live, work, be educated, be entertained and to access services.

The GSC’s plan sees GPOP undergoing Australia’s biggest urban renewal, aiming towards establishing four distinct quarters by 2026:

1. Parramatta CBD and Westmead Health and Education Precinct
2. Next Generation Living from Camellia to Carlingford
3. Essential Urban Services, Advanced Technology and knowledge sectors in Camellia, Rydalmere, Silverwater and Auburn
4. Olympic Park Lifestyle Super Precinct

If this vision is executed effectively, GPOP will be the economic driver and cultural core of the Central River City. It will be a crucial hub of Greater Sydney, similar to precincts like South Lake Union in Seattle or Södermalm in Stockholm.

<table>
<thead>
<tr>
<th>2026 population growth projections across Sydney</th>
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</thead>
<tbody>
<tr>
<td>Central</td>
</tr>
<tr>
<td>Western</td>
</tr>
<tr>
<td>Eastern</td>
</tr>
<tr>
<td>South</td>
</tr>
<tr>
<td>North</td>
</tr>
</tbody>
</table>
Higher Education is transforming GPOP

Both the University of Sydney and Western Sydney University have made significant and sustained investment in the region. Recently this includes commitments of over $1 billion in the Westmead Health and Education Precinct. Western Sydney University has also completed its $220 million flagship campus in the Parramatta CBD, one of the most technologically advanced teaching and research spaces in the world.

The increased commitment of these (and other) universities, has had a clear impact on the region. By 2016, almost 30 per cent of GPOP’s population held a bachelor’s degree or higher compared to less than 20 per cent for the rest of Sydney. Nine per cent of GPOP’s population were postgraduate degree holders, compared to less than 5 per cent for the rest of Sydney.

This is a continuing trend, with GPOP seeing a 7.1 per cent increase in the proportion of tertiary qualification holders since 2011. This far outstrips the rest of Sydney (3.4 per cent), NSW (3.0 per cent) or Australia (4.3 per cent). This trend is particularly visible in Westmead, where there has been an 8.6 per cent increase in tertiary qualification holders.

An educated population is important enabler of future growth as it sets up the region for high value jobs. This occurs through locally led innovation, and by making the region attractive to organisations seeking top talent. The investments of Western Sydney University and the University of Sydney are therefore critical enablers of regional success.

Universities’ investments and world leading research can unlock GPOP’s potential

Parramatta and Rydalmere Campuses

Parramatta and Rydalmere are the core of Western Sydney University’s presence in GPOP and across Western Sydney more broadly. The Rydalmere campus is the largest campus in the area, with over 13,000 students and staff. It includes major academic facilities such as the new $30 million science and health building, as well as cultural assets like the Margaret Whitlam Galleries. It is also home to the Institute for Culture and Society, the Australia-China Institute for Arts and Culture, the Whitlam Institute, and the University’s Chancellery.

The University catalysed the Parramatta Square development, bringing $220 million in industry-partnered investment to establish the 14-storey Peter Shergold Building, a state-of-the-art technology-rich campus, opened by the Premier in May 2017. The University is also partnering with Charter Hall and the UNSW Sydney to develop an Engineering Innovation Hub in the heart of Parramatta CBD, on Hassall St. This facility will harness technology at scale to ensure that students enjoy world-class education.

Westmead Health and Education Precinct

The Westmead Health and Education Precinct is already one of the largest health precincts in Sydney, with a workforce of over 18,000. The precinct is responsible for providing health services to approximately 10 per cent of Australia’s population and providing high quality education to students in health and medicine. The University of Sydney has approximately 1,600 students in Westmead conducting a combination of research, study and clinical placements. Western Sydney University’s Westmead redevelopment is expected to attract 2,500 students once fully completed in 2021 and will include its MARCS Institute for Brain, Behaviour and Development, and the NICM Health Research Institute.

The precinct’s redevelopment is a collaborative process requiring input from government, private sector and universities. Over $3 billion has already been committed to the precinct. Once complete, the Precinct will be an internationally renowned hub for education, health and research. The redevelopment and investment by both universities is expected to see student numbers growing to over 30,000 over the next two decades across both universities.

Major projects in the Westmead Health and Education Precinct include Parramatta North Urban transformation program, Westmead redevelopment including the construction of a Central Acute Services Building, an Innovation Centre, expansion of Children’s Hospital Westmead, expansion of Children’s Medical Research Institute, Westmead Living Labs for both universities, Western Sydney University’s Westmead Campus, University of Sydney’s Parramatta-Westmead Campus and Mayflower Retirement Village development for medical research, and Ronald McDonald House Westmead.

Sydney Olympic Park Lifestyle Precinct

Since the 2000 Summer Olympics, Sydney Olympic Park has been a precinct for Australia’s major sporting and entertainment events with more than 10 million visitors each year. Olympic Park is undergoing change, transforming into a lifestyle precinct that offers a balanced mix of residential areas, open spaces, parklands and sporting grounds.

To leverage the area’s sporting facilities and resources, Western Sydney University and the NSW Institute of Sport have adopted plans to create a Centre of Sports Excellence. The Centre will include a Sports-Tech Incubator and aims to showcase elite athlete and exemplary student programs associated with:

- Sports education
- National and international elite sports
- Research and management

- Health sciences and sports medicine
- Tourism and events management
The Westmead Health and Education Precinct is internationally renowned

Western Sydney University and the University of Sydney are the critical anchor institutions of an emerging internationally renowned education and research precinct. Their investment is at the core of value-generation at Westmead, combined with four major hospitals, three world-leading medical research institutes and the largest research-intensive pathology service in NSW.

Additional initiatives such as the University of Sydney’s, Marie Bashir Institute and Western Sydney University’s, MARCS Institute for Brain, Behaviour and Development and NICM Health Research Institute are major steps towards taking Westmead’s world-class research capabilities to the next level. The large scale and high quality of these initiatives will have a broader impact on policy, innovation and wellbeing across the region, and internationally.

An opportunity exists to create proximity between these activities and relevant businesses that will drive a cluster of related skills and talent, creating significant competitive advantage for GPOP and Australia. Close combination of research, education and businesses is a key factor for precinct success identified by the NSW Innovation and Productivity Council. GPOP has potential capacity not seen elsewhere in Greater Sydney or Australia. With support, it will be catalytic for knowledge job creation, economic growth, and – most importantly – world leading health and wellbeing outcomes.

Western Sydney University and the University of Sydney are pioneering new approaches in GPOP

The University of Sydney and Western Sydney University are collaborating to connect research, teaching, development and deployment of solutions to critical real-world problems. Both universities will use a ‘Living Lab’ framework for parts of the precinct, where the universities will build linkages between researchers, clinicians, health service professionals, patients, families and the community to improve the commercialisation of Australia’s well- recognised, and independently assessed, world-leading research.

Within the two universities, a new multidisciplinary approach will be a guiding principle. To tackle real problems, researchers will use their shared expertise to develop solutions that are implementable and beneficial to end users. For example, the University of Sydney’s ‘Living Lab’ will be guided by four strategic pillars that lead to more effective solutions:

1. Collaborative decision making with their community and partners
2. Interdisciplinary problem solving and knowledge transition
3. Data commons: mobilising data capacity to enable digital transformations in health and wellbeing
4. Precinct focused research and education projects

Western Sydney University and the University of Sydney have long played an important role in developing a capable workforce. This sets up the region for further economic development as well as greater social equality.

In addition to adding student, staff and local jobs, Western Sydney University is expected to attract over $1.2 billion in commercial and industry-partnered investment in health and educational infrastructure in the region in the next 10 years. In the longer term, the University of Sydney expects that its Parramatta Westmead campus will contribute $21.7 billion to the NSW economy by 2050.

Both universities are committed to providing the best opportunities for Western Sydney’s population by offering world class education and facilities, and involving industry and government in this process. Western Sydney University’s new Peter Shergold Building, its upcoming UNSW Sydney-partnered Engineering Innovation Hub, and its Sydney Olympic Park Centre for Sports Excellence all include shared space for industry organisations and government agencies, creating more opportunities for work-integrated learning and fostering research and problem-solving collaborations.
GPOP is becoming an economic powerhouse

In the last five years GPOP has crossed a threshold and is now poised to become an economic powerhouse. As a newly designated ‘priority growth area’, the region is undergoing extensive transformation, with a range of enabling and growth projects underway. More than $10 billion in public and private investment is expected to be delivered within GPOP in the next 5 to 10 years.

This development is focussed on key precincts including the Westmead Health and Education Precinct in the west, Parramatta CBD at its centre and Olympic Park to the east. Parramatta already hosts approximately 30 per cent of Australia’s top 100 businesses, across a variety of industries. However, it is undergoing extensive redevelopment in preparation for an enormous inflow of commercial activity. Major upgrades to transport infrastructure will unlock the commercial potential of GPOP.

In 2014, Parramatta offered the fifth largest office market in Greater Sydney with approximately 700,000 square metres of commercial floor space. By 2021, Parramatta CBD will offer an additional 232,000 square metres of commercial floor space to accommodate demand. It is expected that this space will be occupied by health, government, and financial service organisations. For example, NSW Government will occupy 250,000 square metres of office space by 2022, while National Australia Bank is expecting almost 10,000 workers in the area.

The City of Parramatta has seen substantial growth in jobs, in line with its increasing economic prominence. It reached approximately 178,000 jobs by the end of June 2018, an increase of 13 per cent since 2015 and 32 per cent since 2001. This growth is expected to continue, with projections showing Parramatta as one of the fastest growing regions in Sydney. This is shown in the chart to the right.

In addition to employing large numbers of people, the region also has a low unemployment rate of 3.6 per cent, lower than Greater Sydney (4.4 per cent), NSW (4.5 per cent) and Australia (5.2 per cent).

This has enabled the region to become the second largest economy in NSW, behind only the Sydney CBD. GPOP’s Gross Regional Product was $26.7 billion as at 30 June 2018 and continues to grow strongly.

<table>
<thead>
<tr>
<th>Region</th>
<th>Jobs to May 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>City &amp; Inner South</td>
<td>27,200</td>
</tr>
<tr>
<td>Parramatta</td>
<td>26,600</td>
</tr>
<tr>
<td>Inner South West</td>
<td>24,600</td>
</tr>
<tr>
<td>Inner West</td>
<td>18,000</td>
</tr>
<tr>
<td>North Sydney and Hornsby</td>
<td>17,400</td>
</tr>
<tr>
<td>Outer West &amp; Blue Mountains</td>
<td>14,900</td>
</tr>
<tr>
<td>Eastern Suburbs</td>
<td>14,600</td>
</tr>
<tr>
<td>Blacktown</td>
<td>14,500</td>
</tr>
<tr>
<td>Baulkham Hills &amp; Hawkesbury</td>
<td>13,900</td>
</tr>
<tr>
<td>South West</td>
<td>13,600</td>
</tr>
<tr>
<td>Northern Beaches</td>
<td>9,400</td>
</tr>
<tr>
<td>Outer South West</td>
<td>9,000</td>
</tr>
<tr>
<td>Sutherland</td>
<td>7,900</td>
</tr>
<tr>
<td>Ryde</td>
<td>6,700</td>
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</tbody>
</table>

Both Universities have a proven record and are committed to supporting start-ups and entrepreneurship. Western Sydney University’s ‘Launch Pad’ incubator in the Parramatta CBD, is providing critical support to a network of over 150 start-ups and tech SMEs.

One of three sites across Western Sydney, the Parramatta ‘Launch Pad’, focuses on supporting entrepreneurialism in virtual and augmented reality, data analytics, artificial intelligence and machine learning.
Transport investment will unlock GPOP

Transport accessibility is a critical success factor for every major economic centre. Current and committed investment to upgrade transport infrastructure will enable success. The investment will connect GPOP with the rest of the Central River City and with the other two cities of the Greater Sydney region.

To date, more than $2 billion has been invested in the Parramatta light rail service which will play a crucial role in unlocking the region as a source of skilled labour and destination for knowledge occupations.

The service’s proposed route will link every Western Sydney University and University of Sydney site across GPOP. This connection is critical to realising the demonstrable economic and employment uplift these institutions are bringing. Without this comprehensive link, these gains cannot be delivered.

By 2026, it is expected that approximately 28,000 people will use the light rail service every day and an estimated 130,000 people will be living within walking distance of the light rail stops. The largest cohort of commuters on the route will be students and staff of GPOP’s university and health related entities.

The Sydney Metro is Australia’s biggest public transport project. Sydney Metro Northwest opened in mid-2019, with Sydney-Southwest slated for 2024. The Sydney Metro West, linking Sydney CBD to Olympic Park, Parramatta and Westmead, is expected to open in the second half of the 2020s. This line will reduce congestion and cut travel times between Parramatta and Sydney CBD to 20 minutes.

Roads also play a key role, supporting efficient and reliable connectivity across the metropolitan area. To facilitate movement around GPOP, more than $16 billion is invested in the WestConnex project, a 33km motorway project linking Parramatta and Sydney’s South West with the Olympic Park Precinct, Sydney CBD, Sydney airport and Port Botany. Upgrades are also being made to the Western Sydney Regional ring road to improve traffic flow and support growth in Parramatta.

GPOP will also have access to the new Western Sydney airport. This will support connection to the rest of the country, encouraging investment and economic activity.
GPOP’s diversity and liveability are crucial enablers of growth

Diversity is GPOP’s strength

GPOP’s community is young, diverse, and growing, especially when compared to the rest of Sydney or Australia. This makes for a vibrant and exciting region, as well as an engine for future growth.

GPOP has a high concentration of young professionals and families, with more than 40 per cent of GPOP’s population between the ages of 20 and 40. This large working population means that the region is set up for innovation and growth. Universities are a key factor in this, attracting young people to study and work and enabling broader growth through skills development and innovative research.

Immigration has been an important factor for GPOP’s sustained population growth. With a population made up of 72 different countries, speaking over 140 languages, the region is truly diverse. This means that residents and visitors can access an array of cultural experiences and develop deeper cultural understanding and competencies. It also drives productivity through valuable connections to key international communities and markets, making GPOP a central trading gateway to the rest of the world. Anchor institutions such as the University of Sydney and Western Sydney University will facilitate the development of these connections by continuing to attract international students and generate research partnerships.

Western Sydney University is one of the most culturally diverse universities in Australia with more than 100 cultural and ethnic backgrounds represented in its staff and student community. This diversity will deepen further as GPOP grows, bringing additional, international-facing attributes to bear.
GPOP is becoming more liveable, with new lifestyle offerings

As more families, professionals and visitors call GPOP home, it is vital to improve the liveability of the region. Extensive work has been done to create great places in GPOP to live and work, with further development in the pipeline.

Local councils in GPOP have committed and invested in developing an attractive, liveable and safe area for the community, which has created a vibrant and active regional culture.

In 2017, GPOP hosted more than 5,500 social and cultural events across Parramatta and Olympic Park. Examples of notable events held in GPOP in 2018 include:

- Sydney Royal Easter Show
- Burramatta Naidoc
- Parramatta Lanes festival
- Sydney Writers’ Festival
- Festival of Sydney
- Sydney Science Festival
- A range of flagship sporting events (e.g. the Western Sydney Wanderers home games, World Cup qualifiers, NRL Grand Finals and the Bledisloe Cup)

Retail, hospitality and recreation services play a crucial role in creating a liveable region. In 2017, GPOP and its surrounding area had almost 1,500 registered retail businesses, an increase of ~6 per cent p.a. from 2015. Forecasts show that the growth will translate to an additional $3 billion in retail turnover in the next five years for Parramatta. Food and accommodation services have also increased by ~4 per cent p.a. during this period, with over 1,000 registered businesses in this region.

GPOP’s night-time economy is also growing, particularly in the Parramatta CBD. Downtown Parramatta is becoming the destination of choice for Western Sydney residents for a night out. In 2017, Parramatta’s night-time economy had an annual turnover of over $1 billion in 2017, with the number of establishments in the city increasing each year (3 per cent annual increase in 2017). More than 1,200 establishments make up Parramatta CBD’s core night life economy. Further work is being done to attract and support local businesses into GPOP to increase the variety of food, bars and live music venues. This is driven by large increases in the numbers of students and workers in the region. The growth of the University of Sydney at Westmead and Western Sydney University in Parramatta City are crucial enablers of GPOP’s attractiveness.

GPOP is also improving its liveability by developing affordable, high-quality housing close to jobs, schools and amenities. GPOP is forecasted to accommodate an additional 72,000 dwellings over the next 20 years, with focus on creating next generation living options in Parramatta CBD, Westmead, Camellia, Carlingford and Olympic Park. The University of Sydney is a major contributor, with plans to develop 1,000 affordable housing places near its Westmead campus to attract skilled knowledge workers to Westmead.

Olympic Park has all the ingredients to offer an exceptional lifestyle for its residents. The area has abundant green space, sporting facilities, and entertainment, increasing local retailing and population growth. It already receives more than 10 million visitors per year, and the new metro will offer residents the choice of 10-minute access to jobs or socialising in the CBD or GPOP.

Western Sydney University’s planned Centre for Sports Excellence, with the NSW Institute for Sport and elite sporting and innovation partners will augment Olympic Park’s existing concentration of world-class sporting, event and recreational facilities.

GPOP’s strong commercial and cultural activity is underpinned by safety. Research shows that the community around Parramatta feel safe when travelling in the evening for good reason. In 2018, the Parramatta area’s crime rate was approximately 47 per cent lower than the Sydney East CBD and Inner South areas. To continue creating a safe environment for its community, the City of Parramatta has committed $1.2 million towards upgrading facilities to support growth in night activities in a safe environment.
GPOP needs a clear focus to achieve its potential

Now is the time to plan for a ‘high distinction’

The future GPOP will certainly grow to be bigger and more prosperous than it is now. However, the extent of this growth relies on more than just the forecasted demographic trends and investment in GPOP.

The best outcomes for GPOP will arise through collaborative relationships between anchor institutions and businesses. According to the NSW Innovation and Productivity Council, collaboration is associated with a 70 per cent increase in the likelihood of new world innovation. For GPOP, collaboration between Western Sydney University, the University of Sydney, research institutions, hospitals and businesses is an essential ingredient in transforming the region into a world-class precinct.

Research cited by the NSW Innovation and Productivity Council shows that high productivity clusters of research, innovation and entrepreneurship significantly outperform background economic performance through faster employment growth, higher average wages and outsized contributions to exports. For example, in the UK, the top 31 economically significant areas contributed 20 per cent of the gross value add, but made up only 8 per cent of businesses.

Achieving this requires significant investment and deliberate attention from all contributors. Universities, the NSW Government and industry have made significant contributions as discussed above, but more is required to set the foundations for full growth.

If the necessary focus from a range of leaders is not forthcoming, or is patchy, then GPOP will not reach its potential. Investment to date will enable some level of growth regardless, but will eventually plateau so that the region grows at the same pace as the rest of Sydney, rather than leading the way. However, a strong foundation for growth will allow it to continue to grow at a fast pace. This is visualised below.

The following pages review the foundations for GPOP’s growth, and provide insight into what’s already in place, what’s underway, and what actions are not yet secured.

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<th>Growth driven by investment to date</th>
<th>Potential growth with further investment</th>
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<td>Plateau of growth with inattention</td>
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How GPOP can achieve its potential

GPOP is already a significant part of Sydney. However, to achieve the potential outlined in this document and articulated by government through the Metropolis of Three Cities and the Central City District Plan, GPOP requires further attention.

The framework on the right identifies the seven dimensions of a foundation for successful urban development. These criteria are adapted from the NSW Innovation and Productivity Council’s, *NSW Innovation Precincts* report. Each of the seven elements are integrally linked, with all being required to grow an effective region. Failure to achieve success in any one of these areas will constrain the region as a whole.

Achieving the foundation for success for GPOP will require contributions from wide-ranging stakeholders; from the state and federal governments, to local businesses and community organisations, as well as major educational institutions including Western Sydney University and the University of Sydney.

This report shows how close GPOP is to achieving its future vision through each of the seven foundational dimensions. For each criterion, the report considers questions such as:

- What already exists, or is committed to, in GPOP?
- What’s missing to achieve GPOP’s future vision?
- Who is best placed to address this?

A five-star rating is applied to each assessment. The objective is to stimulate reflection and discussion, challenging everyone who is involved to reach agreement on what needs to be done to make sure that GPOP realises its potential.

Foundation for a successful region

**TRANSPORT INFRASTRUCTURE**
Internal mobility and easy links to key areas (e.g. CBD, airports)

**ECONOMIC FUNDAMENTALS**
Trustworthy and appealing investment destination

**BUILT INFRASTRUCTURE**
Right assets to accommodate growth activities, walkability to facilitate interactions

**AMENITY AND QUALITY OF LIFE**
To attract and retain talent and their families

**SKILL FORMATION**
High quality education develops talent and attracts growth employers

**RESEARCH, COMMERCIALISATION AND ENTERPRISE**
Ongoing source of competitive advantage and new opportunities

**COLLABORATION AND GOVERNANCE**
Shared vision, external attraction, bringing people together in multiple dimensions
Transport infrastructure:
GPOP is on track to be one of the best connected regions in Australia

Transport infrastructure is about enabling mobility of large numbers of people and goods. This includes internal mobility within the region, as well as easy connections to key other locations for business and personal purposes. For GPOP these include business districts such as Sydney CBD, residential corridors and transport hubs.

Existing commitments to transport will support a successful GPOP

The NSW Government has made significant investments in transport infrastructure for the GPOP region, with more to come. The vision for a future GPOP is well supported by these investments (totalling more than $10 billion), with most connectivity needs being met.

Mobility across GPOP will be supported by the Parramatta light rail. This will help transport between precincts in Westmead, Parramatta City and Olympic Park, as well as connect to residential corridors in Camelia and up to Carlingford. However, there are key decisions that need to be made around frequency of services and stop locations. These decisions need to be made sooner to provide confidence to investors and residents.

GPOP already has strong train links to key business districts to the east, west, north-west and south. Connectivity will be substantially improved through the West metro and continued expansion of bus and ferry services.

WestConnex will substantially improve road connections to the Eastern Harbour City, and to Sydney airport. The M12 motorway will provide connection to the coming Western Sydney Airport and Aerotropolis.

The NSW Government needs to maintain strong focus to deliver its ambitious investment plans

While many of the transport infrastructure investments are already under development, some are still only announcements, without comprehensive funding or firm timelines for construction and completion. To support the NSW Government’s own ambitious jobs and economic growth commitment, firm decisions are urgently needed on construction timeframes, stop locations and budget allocations. Without this, plans for the Parramatta Light Rail and Western Metro will not generate the investment attraction and broader support necessary for them to deliver socioeconomic benefits.

There will also still be some important areas of Sydney that fall short of the ‘30-minute city’ ideal. In particular, high quality residential areas in Sydney’s north will lack direct and efficient public transport links to the GPOP region.

The NSW Government is the primary provider of transport infrastructure. By following through on its extensive commitments, it will have effectively enabled a successful future GPOP. Transport infrastructure is one of the most expensive dimensions for a successful region, and well over $10 billion is already committed to ensure GPOP is well placed under this criterion.

GPOP’s success depends on sustained leadership, commitment and funding from the NSW government. Without political will, the promised transport uplift will not be realised at GPOP nor across connecting areas of the Three Cities.
Economic fundamentals:
GPOP has the potential to be an economic powerhouse

The economic fundamentals of a region are in many ways an outcome of other dimensions. They include direct enablers of investment and business activity, such as location, labour supply, reliable utilities, planning regulations, commercial space, and cost profile.

GPOP is an attractive investment destination

GPOP, and the Parramatta CBD in particular, is an increasingly important part of the NSW economy. Even before expanded transport and other investment manifests, it is already seeing rapid growth, indicating that investors have already decided that it is an attractive location.

Like other urban areas in Australia, GPOP has the fundamental prerequisites for investment, a safe environment, an effective legal system, with reliable core services and utilities.

The region is already set up to succeed from a labour supply perspective, with 520,000 workers in the Central River City in 2016. Trends are also in GPOP’s favour, as housing prices increasingly push younger workers away from the Eastern Harbour City.

Economic conditions are also conducive to business investment.

There was 700,000m² in office space in Parramatta CBD in 2017, with an additional 92,000m² under construction. Private investment of $3.4 billion is expected to create 232,000m² in new commercial floorspace by 2022.

Commercial offices in Parramatta CBD in 2017 had 4.3 per cent per cent vacancy compared to 5.9 per cent per cent in Sydney CBD, and no vacancies in A-grade space. The NSW Government is relocating large numbers of jobs to GPOP, and is expected to occupy 250,000m² by 2022.

Recent work by the NSW Small Business Commission has dramatically improved approval processes for small businesses.

Commercial rental costs in Parramatta are still low, at $485 per square metre net face rent compared to $675 on the CBD fringe or $1,025 for CBD premium.

There is a view that development assessment and approval processes at the local level should be improved. Potential for replication of the system already in place in legislation for the City of Sydney should be examined.

In broad terms, these conditions set up the region for sustained growth.

GPOP needs to set up for long term economic success

The future vision of a highly successful GPOP requires more than just an economic equilibrium driven by existing demographic and market forces. Attracting top-end talent and businesses requires progress to be made in other dimensions, particularly infrastructure and amenity.

This vision also requires a diverse economic ecosystem, including small businesses and start-ups that drive innovation. An interesting international example to look to is Barcelona’s 22@ district, which is a world leading precinct for mobile technology. This precinct was primarily developed by an anchor institution in Telefónica, but has an entrepreneurship program called Wayra that has produced the next generation of small and growing businesses. This variety and collaboration has diversified the city, assisting in recovery from recession.
This dimension of regional development relates to the infrastructure in which economic activity takes place. This includes assets to enable business, education, research and events. Built infrastructure is also about facilitating interactions and collaboration, through walkability and shared spaces.

**GPOP has good infrastructure in precincts**

Parramatta CBD has substantial new infrastructure under development to support increased teaching, business and government activity. It also has Parramatta Square, featuring Western Sydney University’s city campus, which will connect nearby offices and transport hubs with highly walkable space. This creates a CBD network model where many organisations share physical spaces, creating ‘collisions’ and interactions between people that lead to opportunities.

Western Sydney University and the University of Sydney are significant investors in the Westmead Health and Education Precinct, setting up an internationally significant research precinct. Once connected by Metro and Light Rail, Western Sydney University’s Rydalmere Campus will bring a further 13,000 students and staff into the GPOP network.

Olympic Park has world leading sporting facilities and large walkable spaces, which provide the foundation for a Lifestyle Super Precinct as envisioned in the District Plan, and aligned to Western Sydney University’s planned Centre for Sports Excellence.

These precincts each enable success in target activities and facilitate interactions that lead to collaboration and improve the region as a whole.

**Connectivity between precincts will multiply success**

Planning within precincts must prioritise the importance of walkability and shared spaces, and continue to design to facilitate and encourage regular interactions.

GPOP also needs to better facilitate interaction and collaboration between the precincts for it to be a successful region, rather than a series of successful precincts. For example, more events and activities in Parramatta Park could bring together people from Westmead and Parramatta.

GPOP planning should strongly enable active transport (e.g. cycle paths). These modes of transport have the potential to connect the three precincts with each other and residential areas on a human scale that boosts community connectivity and reduces road congestion.

Much of the new infrastructure development is high-end, catering to large scale organisations such as universities, government agencies and financial service companies. A mix of price points in close proximity is vital to enable small and medium sized businesses to interact.

At present, the only incubator for start-ups is Launch Pad, funded by Western Sydney University to support tech entrepreneurs and to broker collaboration with applied researchers. Additional spaces should be provided, modelled on Launch Pad or the NSW Government funded Sydney Startup Hub. The proposed Western Sydney Start-up Hub is a welcome first step, but at just 1,500m² is too small (the Sydney Start-up Hub received $30m in funding).

Addressing this requires that developers or government bodies create suitable spaces for small and innovative companies to locate near and participate with the larger organisations.
Amenity and quality of life: GPOP’s services are still catching up

Amenity and quality of life are the features that attract and retain workers and families in a region. It includes services such as restaurants and cafes, cultural attractions like museums, theatres and stadiums. As well as green space, quality schools and sporting facilities add to liveability.

The required investments in big amenity infrastructure are underway

GPOP’s prominent former Olympic facilities host sporting and cultural events, which draw large numbers to the area. The newly refurbished Western Sydney Stadium is positioned close to Parramatta City, enabling easy walking access to a growing night-time economy. This has been matched by high levels of safety, with low crime rates.

There are also significant amounts of green space available, most notably Parramatta Park, along the Parramatta River, and around Olympic Park. The City of Parramatta alone has 212 hectares of parks. However, public space in critical areas is in short supply. Opening up, investing in and enhancing heritage sites like the Lancer Barracks at Parramatta are options worth exploring in the interests of engaging residents with the city’s history, both Aboriginal and post European settlement.

The NSW Government has committed to a new arts precinct near the Parramatta River. This will include a new Museum of Arts and Applied Sciences, and an enlarged and enhanced Riverside Theatres. This will complement historical sites such as Old Government House and a redeveloped heritage precinct in North Parramatta.

All stakeholders could do more to build quality of life

Despite this infrastructure, GPOP is not consistently perceived as an attractive and liveable area. A major component of this is the perception that the area lacks café culture or night life. This will improve organically over time, but all stakeholders in GPOP could do more to support and increase the pace of change, reaching GPOP’s potential sooner rather than allowing a plateau. Examples include:

- Local and NSW Government could adjust planning approvals, noise restrictions, liquor and venue licensing and business incentives to promote hospitality businesses and the night-time economy.
- Local and NSW Government could invest in more small community spaces like community halls and libraries, which can reflect the local character and build community connections in a way that large attractions cannot.
- Industry and community could invest in or create these businesses, as well as purchasing services.
- Universities, businesses and governments could open up buildings for dual use, for example hosting live music in university buildings when not in use, or the Australian government providing access to Lancer Barracks as additional community space in the city.

As a diverse area, GPOP can also look to develop cultural attractions that embody the region. These will make GPOP not only a more liveable area for students, residents and workers, but also a genuine cultural destination for the rest of Sydney.
Skill formation: GPOP will be an increasing core region for developing skilled labour

Skill formation relates to the strength of the local education system, including producing skilled labour to support industry, and providing opportunities for upskilling.

Universities are dramatically improving higher education in GPOP

Both Western Sydney University and the University of Sydney have had a significant presence in GPOP for multiple decades, and both have committed to major investments in the recent past and near future, totalling over $2 billion. This includes new facilities in Parramatta City and Westmead and an expansion of teaching scope by the University of Sydney in particular, with every faculty to have presence at Westmead.

These investments will improve the quality of education in GPOP, as well as bring in large numbers of students: between the two Universities, more than 30,000 students are expected in the region by 2030. This will provide significant capability to the region.

This is complemented by the redevelopment of schools in Parramatta City, including Parramatta Public School and Arthur Phillip High School.

At present, GPOP is a net exporter of skills. In 2016, 46 per cent of the Central River City workforce travelled outside the region for work. Anticipated jobs growth will provide more high value jobs closer to home for GPOP residents.

The two universities have set an example for this through strong collaboration, working together to develop the Westmead Health and Education Precinct. Western Sydney University is also collaborating with the UNSW Sydney in a new Engineering Innovation Hub in Parramatta CBD, and potentially with the University of Canberra and the NSW Institute for Sport in a Centre for Sports Excellence at Olympic Park.

Improved VET and better integration with school education are opportunities

Vocational education and training (VET) also contribute to skill formation in and from GPOP. However current levels of enrolments by students living in GPOP (~27,000 VET students per annum) will be outstripped by large increases in university enrolments. This is part of a wider trend that has seen the VET sector fall behind in its traditional important role of supplying skill sets and opportunities that are critical for a wide range of industries. There are labour shortages in key sectors that VET could fill, including in construction and information technology.

The planned high growth in university demand provides an opportunity to build new linkages between schools, VET, employers and universities to magnify the strength of the GPOP workforce, further attracting high quality businesses and jobs. This will enable all workers to continue to develop their skills as roles, technologies and industries change.

Anticipated substantial economic and employment gains for GPOP will not be achieved if the Federal Government persists with its 2017 ‘freeze’ on funding for undergraduate university enrolments. Failure to completely lift this measure will render the achievement of NSW and Federal Government’s jobs growth targets for Western Sydney and GPOP impossible. While the Commonwealth has signalled a lifting of the freeze in late 2019, it proposes tying the rate of funding to a flat 1.35 per cent demographic growth figure, coupled with unspecified university performance metrics that will not come close to meeting demand.

This highly restrictive budgetary and policy setting is perhaps the biggest risk to GPOP’s success from education and labour market standpoints.

What’s already in place:
- Major investment from universities to increase higher education participation
- Building a high-quality pool of labour to attract quality businesses and jobs

What’s still required:
9. Improve scale and scope of VET
10. Support knowledge job creation
Collaboration and governance are crucial baseline enablers of all the other dimensions of successful regional development. Successful large urban areas have developed sophisticated and multi-dimensional connections over many decades. These networks play a crucial role in developing and projecting the shared vision and attracting investment, business and talent.

Many parts of GPOP have important collaboration and governance structures

There is a range of existing collaboration and governance structures across the region. These provide leadership and bring the region together, and could form the basis of a future stronger governance model. Some examples include:

- The City of Parramatta and Cumberland Council provide leadership and governance across a range of activities and responsibilities, as does the NSW Government.
- The Westmead Health and Education Precinct involves a collaborative partnerships between all contributors, including the University of Sydney, Western Sydney University, Western Sydney Local Health District, the Sydney Children’s Hospital Network, Westmead Private, the Westmead Institute for Medical Research and the Children’s Medical Research Institute.
- There are significant university collaborations, most prominently between the University of Sydney and Western Sydney University.
- The Sydney Business Chamber, Western Sydney Business Chamber, Olympic Park Business Association and Western Sydney Leadership Dialogue have all led a focus on growing economic opportunities in Western Sydney, drawing business leaders and public sector leaders together.
- The Westmead Alliance was formed by 10 organisations across health, local government, businesses and the two Universities to develop and promote a shared vision of the potential of the Westmead precinct.

Diverse GPOP leaders can play a critical role in deepening and maturing shared vision and collaboration

For GPOP to reach its potential, it needs a consistent vision ‘owned’ by organisations and citizens across the community. Leaders across diverse dimensions of the community will be the key to developing and establishing consensus commitment to what GPOP is and will be.

Leaders of existing organisations are best placed to build a consensus vision and to use it to attract new businesses. They can do this by creating an open environment where businesses can easily gain access to collaborate with all the capabilities of the strong incumbent organisations. A shared vision can also be used in international marketing and promotion for investment attraction.

The collaboration should consider and work with a wider range of leaders to focus on all the ingredients for success presented in this report (amenity, lifestyle, transport etc). This includes the major precincts of Westmead, Parramatta CBD and Olympic Park, and also plans for the future of residential areas towards Carlingford and around Camelia, Auburn and Rydalmere. A consistent vision must capture the distinctive characters and needs of these areas.

Universities in particular should be seen as key institutions for regional development. Their contribution to education, employment, innovation and culture cannot be understated. The University of Sydney and Western Sydney University are already highly collaborative, and they seek more and deeper engagements with other stakeholders in GPOP. Governments should see universities as a critical partner in developing a region, and should consult with them on major decisions as they would with community or industry. Similarly, Western Sydney University and the University of Sydney should be key members of any collaborative leadership of the GPOP region.

This collaboration would also enable proposed solutions to challenges in other dimensions of success.

Collaboration and governance score card

What’s already in place:
- A range of existing bodies providing collaboration and leadership for particular subregions or dimensions

What’s still required:
11. Develop shared vision that includes the transformative role of universities
Success in research, commercialisation and enterprise creates an ongoing source of competitive advantage for a region. The combination of these three stages of innovation delivers export potential and creates a magnet for talent and further investment. Precincts that contain these strengths confer substantial economic and social benefits on their surrounding wider region.

**GPOP will be increasingly distinguished by the internationally significant investments in research**

The Westmead Health and Education Precinct makes GPOP a national leader for research, especially in healthcare but also across other disciplines. This is built on major investments made by the University of Sydney, Western Sydney University, and the NSW Government. The proximity of research and major hospitals provides an enabler of cross-sector growth.

The University of Sydney is also intending to leverage conventional healthcare research disciplines to engage a range of other disciplines to expand the scope of research success. This would see researchers working together to solve selected health and community problems or needs. Western Sydney University already has a diversity of research in the region, including the MARCS Institute for Brain, Behaviour and Development, NICM Health Research Institute, Young and Resilient, and Transforming Early Education and Childhood Health.

**More can be done to leverage research strengths**

The research strengths in the area could be better leveraged by attracting more businesses to participate in commercialisation of research outputs. In other successful clusters, this involves a mix of established internally connected firms, as well as start-ups and rapidly growing mid-sized firms.

A range of expanded strategies could be investigated to accelerate entrepreneurship and business growth, similar to Western Sydney University’s Launch Pad. Options (in addition to collaborative leadership discussed above) could include streamlined access to de-identified public data and research and development partnerships within the precinct.

Other opportunities could be to secure public sector investment in specialised research assets that would attract high tech researchers, and arrangements to enable joint development and sharing of access to high-cost laboratories and facilities.

Supported spaces and events where start-ups, researchers and established companies could more easily interact to exchange ideas and – for example Western Sydney University’s CatalystWest initiative – could also open-up the barriers that frequently impede collaboration and innovation. There is also likely to be a role for conventional investor-atraction incentives. This should be deployed on the back of shared vision developed by local leaders as recommended above.

**What’s already in place:**

- Internationally significant research precinct at Westmead based on significant investment
- Plans to expand scope of research to other fields

**What’s still required:**

12. Build existing research strengths
13. Facilitate research and industry collaboration
Conclusion: GPOP needs more attention to achieve its potential

Many important investments in GPOP’s future success have already been made by governments, universities and industry, as presented throughout the report.

These investments have mainly focussed on transport infrastructure, economic fundamentals, skill formation, research and enterprise. While there is still room for improvement in these areas, in these criteria GPOP is largely set up for success.

To achieve GPOP’s full potential, existing commitments will need to be supplemented by new approaches or investment in built infrastructure, amenity and quality of life, and collaboration and governance. Key improvements to make are:

- **Local infrastructure** needs to be shaped or provided to enable economic and social collaboration, active local mobility and to provide for diverse types and scale of business activities.

- **Amenity and quality of life** are crucial enablers of all other dimensions. If talented people are not offered attractive places to live, raise families and develop community connections, then their long-term investment in the region is compromised. This has direct economic and place-making implications.

- **Collaboration and governance** are crucial to maximising the value of other investments. A shared vision and practical opportunities for research and industry collaboration will accelerate realisation of high-end potential.

Importantly, while the recommended focus areas are just as crucial as those made to date, they are significantly less expensive than the ‘hard’ infrastructure commitments that have already been made by government, business and universities. Hence leadership and relatively low cost investment will ensure the success of the region.
Members of GPOP need to address specific gaps in the region’s foundation for success

A series of specific areas for improvement have been identified throughout the scorecard evaluation. Addressing these will require commitment from all members of the GPOP community, including all levels of government, anchor institutions like Western Sydney University and the University of Sydney, small and large businesses in the region, and the community more broadly.

Some specific actions that can provide a foundation for GPOP’s growth include:

1. **Confirm transport infrastructure**

NSW Government needs to finalise planning of new transport infrastructure, including confirming routes and dates.

2. **Invest in transport links**

NSW Government could invest in better transport links to high quality residential areas in the Hills district, which would increase housing options for relocating highly skilled labour.

3. **Prepare for the transport future**

NSW Government could start developing a plan for the incentivisation, development and regulation of driverless and innovative transport options.

4. **Connect to Western Sydney Airport**

NSW Government could plan for a direct and rapid transport connection between GPOP and the Western Sydney Airport and Aerotropolis.

5. **Improve development assessment and approval processes**

Local government could improve development assessment and approval processes, particularly by copying other areas such as City of Sydney.

6. **Emphasise active transport between precincts**

NSW and local government and developers should put greater emphasis on active transport between precincts.

7. **Support start-up incubators and accelerators**

NSW Government, local government, universities and local businesses should do more to establish and enable start-up incubators and accelerators.

8. **Support growth of underdeveloped night-life**

All parties need to support growth of the underdeveloped night-life, live music and cultural opportunities. This includes:

- Local and NSW Government should adjust planning approvals, noise restrictions and business incentives for hospitality.
- Industry and community should invest in and use local services.
- Federal, NSW and local governments, as well as universities and local businesses, should open-up buildings and sites for dual use. This would catalyse cultural opportunities and foster stronger community connections.

9. **Improve scale and scope of VET**

NSW Government could improve the scale and scope of VET in the region, which is lagging behind as part of broader national trends.

10. **Support knowledge job creation**

The Federal Government must urgently lift – without restrictions – the ‘freeze’ on funding for undergraduate domestic university student enrolments, enabling its own knowledge job targets for GPOP to be met.

11. **Develop shared vision that includes the transformative role of universities**

All members of GPOP, include governments at all levels, universities, businesses and the broader community, should work together to develop a shared vision for the region, and then use that message to attract further investment and talent. Universities should be drawn in as vital contributors in developing the region.

12. **Build existing research strengths**

The Federal Australian government and the universities should provide additional targeted investment to build on existing research strengths.

13. **Facilitate research and industry collaboration**

Businesses, universities and NSW Government need to facilitate collaboration between research and industry, especially between tenants within the Westmead Health and Education Precinct. This includes support for innovative start-ups.
Sources


5. Greater Sydney Commission, GPOP Our True Centre: The connected, unifying heart. https://www.greater.sydney/project/gpop


Charts

Sydney’s Demographic Centre over time:


13. Calculated as the weighted average latitude and longitude, averaging locations by centroid of each LGA. Note that this is calculated slightly differently to the Australian Bureau of Statistics’ calculation, hence different 2016 results of Granville vs Ermington (although both are adjacent to GPOP).

2026 population growth projections across Sydney:


Job growth projections to May 2023 for Sydney regions:

15. Department of Jobs and Small Business Projections.

Map of transport around GPOP:

16. Based on research of existing and proposed transport.

Age distribution of GPOP compared to different areas of Australia:


18. Australian Bureau of Statistics census data was analysed to determine the age distribution across different cross sections of the Australian population.

Cultural distribution of GPOP compared to different areas of Australia:


20. Data representing ‘country of birth of parents’ was sourced from the Australian Bureau of Statistics’ census data and used as a proxy to reflect the cultural distribution of different regions across Australia. The analysis counts the number of instances where one or both parents are born overseas.

21. Countries that make up “other countries” include:

- Croatia
- France
- Germany
- Greece
- Hungary
- Italy
- Korea
- Lebanon
- Macedonia
- Malta
- Netherlands
- New Zealand
- Philippines
- Poland
- Russia
- Serbia
- South Africa
- Spain
- Sri Lanka
- Turkey
- Vietnam.

Indicative difference in growth through further investment:

22. No source, indicative interpretation.