



20 Economic effects

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20.1 OVERVIEW

This chapter provides an assessment of the local and regional economic benefits and impacts associated with the construction and operation of the project. It is based on the impact assessment prepared by Essential Economics and presented in Appendix N: *Economic impact assessment*.

The impact assessment identified six precinct areas as having potential to be affected by the project. These precincts contain businesses that could be impacted by land acquisition, construction and/or operation. Within these precincts, the impact assessment identified several enterprises that would be affected by land acquisition. Most of these businesses are in the Green Wedge Zone 2 Precinct.

Once operational, the project is expected to generate benefits for the South East Melbourne region by improving access to key economic and employment nodes and delivering a more balanced transport network. Businesses in the study area would benefit from the improved transport network. The proposed benefits of the project for Melbourne's south-east are provided in Chapter 2: *Project rationale and benefits*.

Properties within the study area may also be affected by restricted access and reduced amenity, particularly during construction.

Four of the precincts are likely to experience positive and negative economic impacts from the project; Green Wedge Zone 2 Land, Moorabbin Airport, Garden Boulevard Industrial Precinct, and Woodlands Industrial Precinct. No significant impacts were identified for enterprises located at the Governors Road Industrial Node or the Chelsea Heights Node precincts.

Potential adverse economic impacts will be managed through early and consistent engagement with relevant stakeholders, and the preparation of access plans with individual businesses. Any premises acquired for the purposes of the project will be compensated in accordance with the requirements of the *Land Acquisition and Compensation Act 1986 (LAC Act)*.

20.2 EES OBJECTIVES AND REQUIREMENTS

The *Scoping Requirements for Mordialloc Bypass Environment Effects Statement* (scoping requirements) (DELWP 2018) does not provide specific objectives or assessment criteria for impacts on the local or regional economy.

20.3 LEGISLATION AND POLICY

Key legislation and policies relevant to the assessment of economic effects from the project are outlined in Table 20.1. Full details are provided in Appendix N: *Economic impact assessment*.

Table 20.1 Key economic legislation and policy applicable to the project

Legislation/policy	Description
State:	
<i>Transport Integration Act 2010</i> (Vic)	<p>Establishes a legislated policy framework for the provision of an integrated and sustainable transport system in Victoria that contributes to an inclusive, environmentally responsible state.</p> <p>Requires that all decisions affecting the transport system be made within the same integrated decision-making framework and support the same objectives. Brings together the whole transport portfolio, including ports and marine, under one statute.</p> <p>Recognises that transport has an important role facilitating economic prosperity and the productivity of existing businesses, and helping people access job opportunities.</p> <p>As it is transport infrastructure, the project must comply with the requirements of the Act to meet the legislated transport system objectives.</p>

Legislation/policy	Description
<i>Land Acquisition and Compensation Act 1986 (Vic) (LAC Act)</i>	<p>The Act establishes processes for occupation and acquisition of land for public purposes and the associated payment of compensation. The Act allows State Government Departments and Agencies to acquire land required for a public purpose. Acquisition can be done either compulsorily or by negotiation.</p> <p>The Act provides:</p> <ul style="list-style-type: none"> the procedures for the compulsory or negotiated acquisition of land the procedures for the determination of compensation.
Local:	
<i>City of Kingston Council Plan 2017–2021</i>	<p>The key document that guides City of Kingston activities for 2017–2021 and prioritises strategic directions and funding commitments.</p> <p>Key goals that are relevant to the project are:</p> <ul style="list-style-type: none"> a well-planned, liveable city supported by infrastructure to meet future needs a free-moving, safe, prosperous and dynamic city, including these key directions: <ul style="list-style-type: none"> understand and support our thriving, profitable local economy, including encouraging investment into Kingston and the South East to deliver new employment opportunities, and support to businesses to achieve long-term business sustainability integrated, accessible transport and a free-moving city, including functional local traffic management, and advocating for the provision of efficient freight movements.
<i>Prosperous Kingston, 2016</i>	<p>The strategic framework for Council’s objectives for economic development and sustainability. Outlines the City of Kingston’s importance as one of Victoria’s major employment centres and that its industrial sector is one of the largest in the state. Outlines the potential for the substantive planned State Government infrastructure investment to bring about economic change in the area.</p> <p>Actions outlined in Prosperous Kingston that are relevant to the project, are:</p> <ul style="list-style-type: none"> work with State Government to successfully deliver key arterial road investments develop measures and strategies to enable the delivery of a fit-for-purpose road network to support globally competitive business leverage government infrastructure investment to maximise the broadest possible economic opportunities.
<i>Moorabbin Airport Master Plan, 2015</i>	<p>Sets out the strategic vision for Moorabbin Airport over the 20 years from 2015 as a major Victorian transport gateway, and as a growing hub for employment and other economic activity in metropolitan Melbourne and Victoria.</p> <p>Because of the airport’s economic importance, it will be important to identify benefits that the project facilitates for enterprises on the site, and to identify any potential negative impacts on the employment hub during construction and operation.</p>

20.4 METHODOLOGY

The methodology applied to the economic assessment included:

- a review of relevant local and state policies, strategies and laws relating to enterprises
- an overview of the enterprises located within the defined study area, identifying enterprises/precincts as being of high, medium and low importance in terms of access impacts from the project
- identifying economic issues, opportunities and constraints associated with the project through stakeholder consultation
- identifying potential impacts on the regional economy arising from the project
- identifying mitigation measures to reduce any potential negative impacts on business, industry and the regional economy
- following the risk assessment process described in detail in Chapter 4: *EES assessment framework and approach*.

20.5 STUDY AREA

The study area used for economic assessment represents the region of most relevance to the project from a regional economy context. It is based on the Australian Bureau of Statistics (ABS) Statistical Area 2 (SA2) locations of:

- Clarinda-Oakleigh South
- Clayton South
- Moorabbin-Heatherton
- Moorabbin Airport
- Dingley Village
- Mordialloc Parkdale
- Braeside
- Aspendale Gardens-Waterways
- Keysborough
- Chelsea Heights.

The spatial extent of these areas is shown on Figure 20.1.

20.6 EXISTING CONDITIONS

The project is in metropolitan Melbourne's south-east bayside region, 20 to 30km from Melbourne's central business district (CBD).

20.6.1 Key precincts

A broad range of different business activities are located within the study area. These include:

- agriculture (market gardens)
- horticulture retail and wholesale
- retail and service stations
- industrial and commercial uses.

There are six key precincts along the project alignment that are home to businesses that could be affected by land acquisition, or in the construction and/or operational phases of the project. These precincts are shown in Figure 20.1 and Table 20.2 provides a description of each precinct.

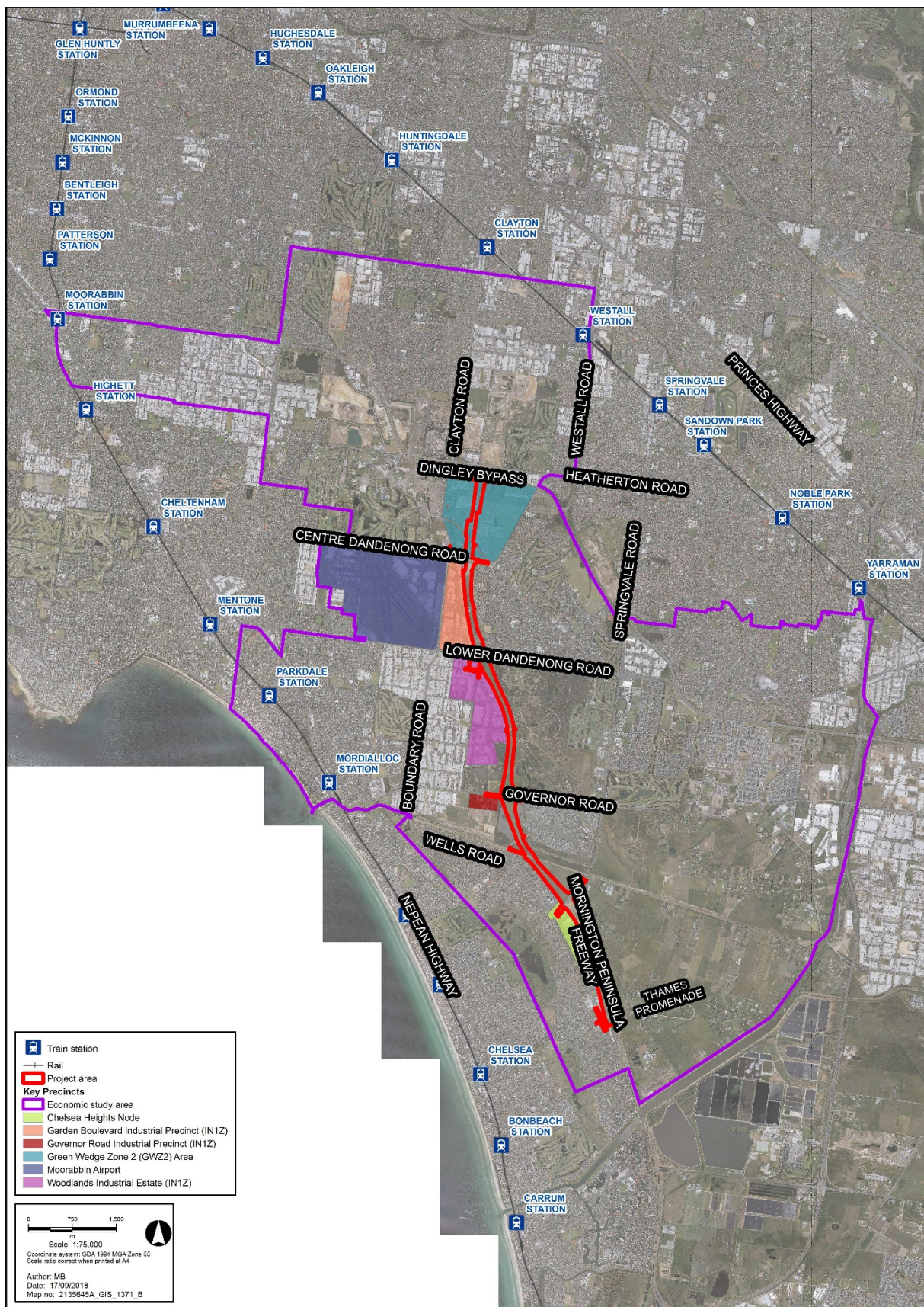


Figure 20.1 Economic study area and key precincts

Table 20.2 Overview of key precincts

Precinct	Description
Precinct 1: Green Wedge Zone 2 Land	Accommodates several uses permitted under green wedge planning controls: nurseries, landscaping materials and soil retailers, and market gardens (near Centre Dandenong Road). A significant portion of land is vacant or underutilised.
Precinct 2: Moorabbin Airport	Site controlled by the Federal Government and key aspects include: <ul style="list-style-type: none"> • airport, flight training school, Australian National Aviation Museum, and other associated aviation aligned uses • DFO Moorabbin (shopping centre), Kingston Central Plaza (shopping centre) • Chifley Business Park, including several large format industrial uses, some office, and a Costco large format discount retail store.
Precinct 3: Garden Boulevard Industrial Precinct	Industrial and aligned office uses, some of which directly abut the vacant reserve that would accommodate the proposed Freeway. A McDonald's restaurant and Coles Express service station are at or near the intersection of Boundary Road and Centre Dandenong Road.
Precinct 4: Woodlands Industrial Precinct	Industrial and aligned office uses, some of which directly abut the vacant reserve that would accommodate the proposed Freeway.
Precinct 5: Governors Road Industrial Node	A developing node of industrial uses is close to the proposed Freeway alignment.
Precinct 6: Chelsea Heights Node	Retail, industrial and other enterprises in Chelsea Heights, the most prominent of which are the Chelsea Heights Hotel and Womersley's Mitre Ten store.

In addition to the key precincts and land uses outlined above, the residential areas of Dingley Village, the Waterways, and Braeside Park are directly east of the project alignment. The residential suburb of Aspendale Gardens abuts the project alignment between Mordialloc Creek and Springvale Road.

20.6.2 Population growth and outlook

There has been strong population growth in the study area in recent years, which is mostly due to urban infill development and increased density. In 2016, the population of the study area was 109,090 persons, up from 94,500 persons in 2008. This is an overall increase of 14,500 people in eight years and an annual average growth of 1.8 percent, which was the same as the annual average growth rate of Greater Melbourne for the same period.

The population of the study area is forecast to continue to grow significantly over the coming decades. By 2031, it is anticipated that the study area would contain a population of about 129,610 persons, an increase of 20,530 from the 2016. The average annual population growth for the study area from 2016 to 2031 is forecast to be 1,370 persons or 1.2 percent.

Further details on population growth within the project study area is provided in Appendix N: *Economic impact assessment*.

20.6.3 Industry structure and employment

Industry of employment

The largest individual industry for employment of residents within the study area is Health Care and Social Assistance, with 5,660 employed residents and 11.5 percent of overall employment. Other prominent industries for employment are Retail Trade (5,400 employed residents; 10.9 percent) and Manufacturing (5,530 employed residents; 11.2 percent). The share of study area residents employed in manufacturing industries is significantly higher (3.5 percentage points) than Greater Melbourne.

Industry of occupation

As in Greater Melbourne, the largest occupation of residents in the study area is Professionals, with an overall share of 21.7 percent. This was followed by:

- Clerical and Administrative Workers (14.8 percent)
- Technician and Trade Workers (13.2 percent)
- Managers (12.6 percent).

The share of residents in the study area employed as Professionals or Managers is lower than for Greater Melbourne, and the proportion of study area residents employed in blue collar professions and Sales and Clerical Administration is higher than the Greater Melbourne average.

Provision of local jobs

Manufacturing is the largest individual industry providing jobs in the study area, employing 14,210 people and making up 23.8 percent of all local employment. In comparison, the share of jobs attributed to Manufacturing in Greater Melbourne is 7.9 percent, or 15.9 percentage points lower.

The greater relative importance to the study area of the Manufacturing and Construction sectors is because there is a large amount of industrial zoned land in the study area, including Woodlands Industrial Estate and Redwood Gardens Industrial Estate.

Labour force

At September 2017, the unemployment rate in the study area was 5 percent. This is less than the unemployment rate for Greater Melbourne (6.2 percent) and Victoria (6 percent).

Business counts

At the end of financial year 2016–2017, there were approximately 11,370 businesses trading in the study area. The industry with the most businesses was Construction, with 1,840 businesses or 16.2 percent of all businesses. This was followed by:

- Manufacturing (9.4 percent)
- Rental, Hiring and Real Estate Services (11.2 percent)
- Professional, Scientific and Technical Services (10.5 percent).

20.7 RISK ASSESSMENT

An environmental risk assessment (ERA) was undertaken to identify environmental risks associated with the construction and operation of the project. Where initial risks were rated as 'medium' or higher (with standard controls in place) these issues were further assessed and investigated in the Economic Impact Assessment Report. Where necessary, additional controls were identified as part of the Impact Assessment to reduce the identified risks to acceptable levels. These controls have been incorporated into the environmental performance requirements (EPRs) for the project. The initial risks were then re-assessed following application of the EPRs to derive the residual risk ratings. The methodology for the risk assessment is described in Chapter 4: *EES assessment framework and approach*.

The risk assessment identified the risk of three categories of economic impacts, namely impacts due to land acquisition; impacts on sensitive businesses, primarily due to amenity issues, land access and land acquisition; and impacts due to land access changes during construction.

Table 20.3 provides a summary of the economic related risks identified. The only economic risk that was rated 'Medium' or above during the primary risk rating process related to construction activities negatively affecting nearby business trade or ability to carry out normal business activities (risk R-E2). With additional mitigation in place the residual risk rating is reduced to low. A range of other potential risks were identified, all of which were assessed to be of low risk. Due to high community interest during ongoing stakeholder engagement, Table 20.3 also includes economic related risks related to:

- compulsory land acquisition
- access to businesses during construction
- operational phase impacts on businesses.

These risks all returned a 'Low' initial risk rating.

The primary risk rating process rates economic risks relating to the various project phases on the assumption that all standard risk mitigation controls are in place and working as intended. In this case the standard controls included prior consultation during design and construction; the payment of compensation; and traffic, access and environmental management plans aimed at minimising disruptions that cause economic impacts.

Further information on economic related primary risks and potential impacts, are contained in Appendix N: *Economic impact assessment* and Attachment I: *Environmental risk assessment report*.

Table 20.3 Economic impact risk

Risk	Impact pathway	Primary impact	Project phase	Initial risk rating	EPR ref.	Residual risk rating
R-E1	Compulsory land acquisition	Compulsory acquisition of commercial land lead to impacts on viability of productive activities/business operations.	D	Low	E1 S1	Low
R-E2	Impacts on local economy	Construction activities negatively affect nearby business trade or ability to carry out normal business activities.	C	Medium	E1 E2 S1	Low
R-E3	Land access issues for local land users	Construction activities lead to reduced access to businesses and other properties.	C	Low	E1 S1	Low
R-E4	Impacts on local economy	Potential permanent impacts on access to businesses and other properties from operation of the project.	O	Low	E1	Low

20.8 IMPACT ASSESSMENT AND MITIGATION

20.8.1 Construction

Compulsory land acquisition (Risk R-E1)

Face-to-face meetings or phone conversations were held with representatives from businesses in the Garden Boulevard Industrial Precinct, Moorabbin Airport, Green Wedge Zone 2 and Woodlands Industrial Precinct, that could be impacted by the project (Figure 20.2 – Figure 20.4) to identify economic issues, opportunities and constraints.

All, or nearly all, of the land accommodating the following enterprises within the Green Wedge Zone 2 would be acquired for the project, resulting in the displacement of the businesses:

- market garden operator(s), in close proximity to Centre Dandenong Road
- trade industry skills and automotive training business
- several wholesale nurseries (refer Figure 20.2).

Uneeda Bricks (a recycled brick company) is the only enterprise in the Garden Boulevard Industrial Precinct that will be directly impacted by the project. The business is located on land that will be acquired, leading to the displacement of the business (Figure 20.3). Major Road Projects Authority (MRPA) has undertaken consultation with the land owner of this property and have been informed that Uneeda Bricks will vacate the premises prior to acquisition.

The privately-owned Smith & Gordon Wholesale Nursery, located on Grange Road, Dingley Village, will also be displaced because of the project (Figure 20.2). Again, MRPA are in consultation with the nursery and compensation will be agreed to between both parties in accordance with the *Land Acquisition and Compensation Act 1986* (Vic) (LAC Act). The owner of the nursery has been proactively seeking another property to tenant, to ensure that the business is not disrupted because of the project.

Although not directly related to land acquisition, the project would result in the displacement of Enviromix, a compost and mulch business, located off Grange Road. The Enviromix site is owned by VicRoads and the lease agreement will be terminated in this case. MRPA has been in consultation the business and conclusion of the lease will be in line with existing lease agreement conditions.

An additional market garden nursery business located between Centre Dandenong and Old Dandenong Road will be displaced because of the project. MRPA has been in discussion with the land owner and has been informed that the tenant will be vacating prior to project development.

Loss of on-street parking on Woodlands Drive and 62 Tarnard Drive will impact the operations of nearby sites. The proposed extension of Tarnard Drive to connect with Woodlands Drive will result in an area of land being acquired from the property at 63–67 Tarnard Drive, resulting in the loss of approximately ten carparks. This will impact the operations of a potential enterprise at this site.

Two small areas of private property at the intersection of Bell Grove and Lower Dandenong Road will also be acquired as part of the project. The area of land required for the project is primarily nature strip, however, three car parking spaces on the eastern property and one car space on the western property will be impacted by the acquisition. The loss of these parking spaces is not expected to impact on the use of these properties. Land acquisition of these parcels will be in accordance with the LAC Act.

Impacts on businesses displaced by the project will be mitigated through the implementation of a Business Disruption Plan (EPR E1). The Plan will include provisions for an agreement to be reached between stakeholders regarding impact avoidance and/or mitigation measures (including compensation) where business disruption is unavoidable and causes affected business owners financial or other losses. Social impacts have been investigated as part of Chapter 19: *Social effects* including the need for early and consistent engagement. The associated EPR, EPR S1 outlines the requirement for the development and implementation of a Community and Stakeholder Engagement Management Plan.

MRPA will seek to reduce disruption to businesses from direct acquisition and work with business and land owners to endeavour to reach agreement on the terms for possession of the land. During the preliminary design phase of the project, the current freeway alignment option was selected from several potential alignment options to avoid direct impacts on BR Demolitions and Dingley Village Mechanical.

Impacts on local economy (Risk R-E2)

The potential exists for construction activities to negatively affect nearby business trade or the ability to carry out normal business activities.

Utility assets identified within the project area include stormwater and sewer, electricity transmission (overhead and underground lines), gas and fuel pipelines and telecommunications lines. Construction works could unexpectedly damage or disrupt services, causing business activity to be suspended until services are returned. Impacts on these assets will be minimised through detailed design and construction with any relocations coordinated with the associated utility company (EPR E3).

The Business Disruption Plan (EPR E1) will also ensure careful planning is undertaken prior to road closures or utility service interruptions to minimise impacts on business access and parking, and that a process for early communication with traders and businesses regarding changes to road conditions and the timing/nature of construction works is implemented. This will be supported with early and consistent engagement, in line with an approved Community and Stakeholder Engagement Management Plan (EPR S1).

Ongoing engagement and communication with nearby businesses to understand and develop location specific mitigation measures. The risk assessment process concluded that the implementation of these measures will reduce the risk of construction activities negatively affecting nearby business trade or ability to carry out normal activities to a Low rating.

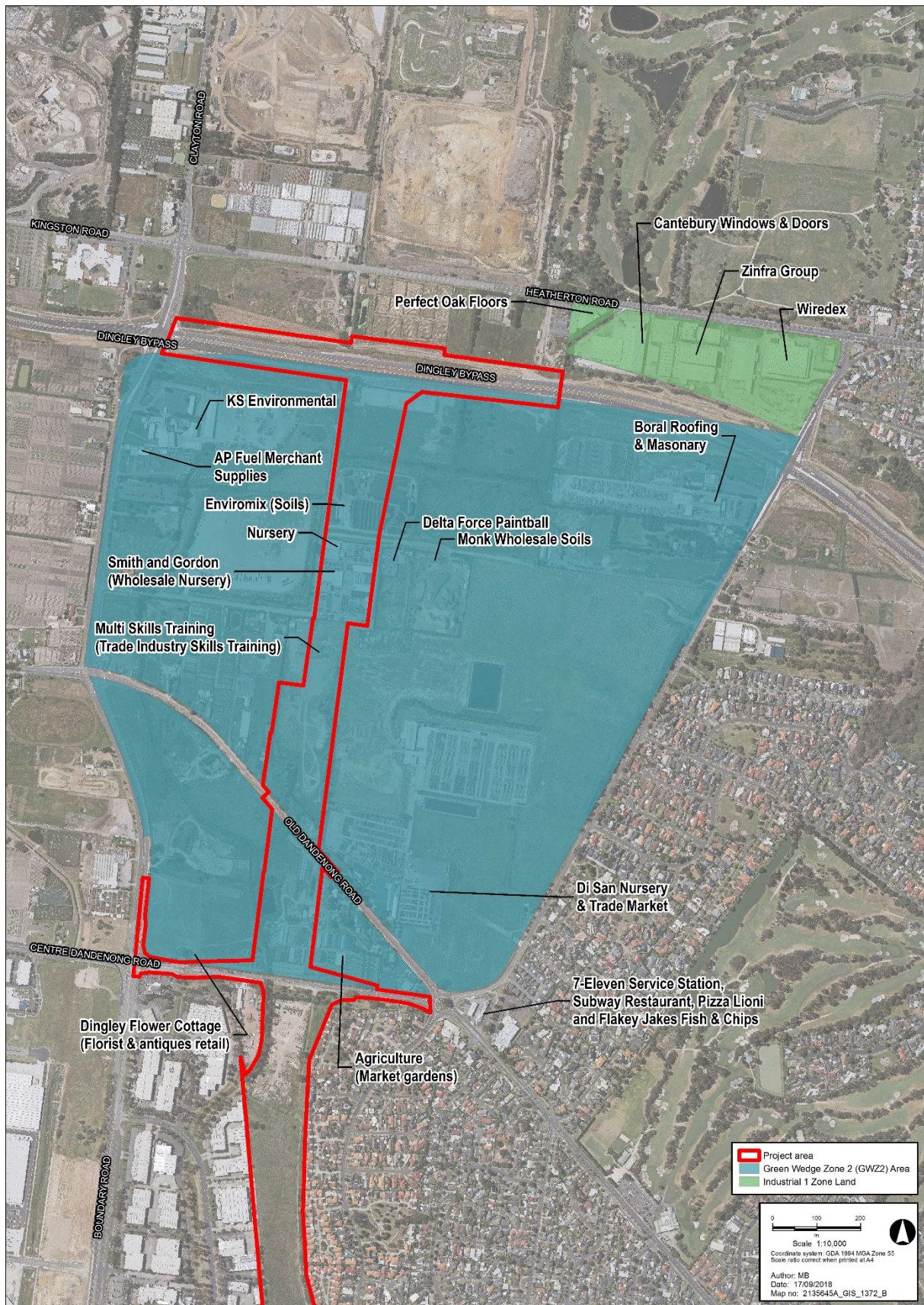


Figure 20.2 Precinct 1: Green Wedge Zone 2 land and surrounds

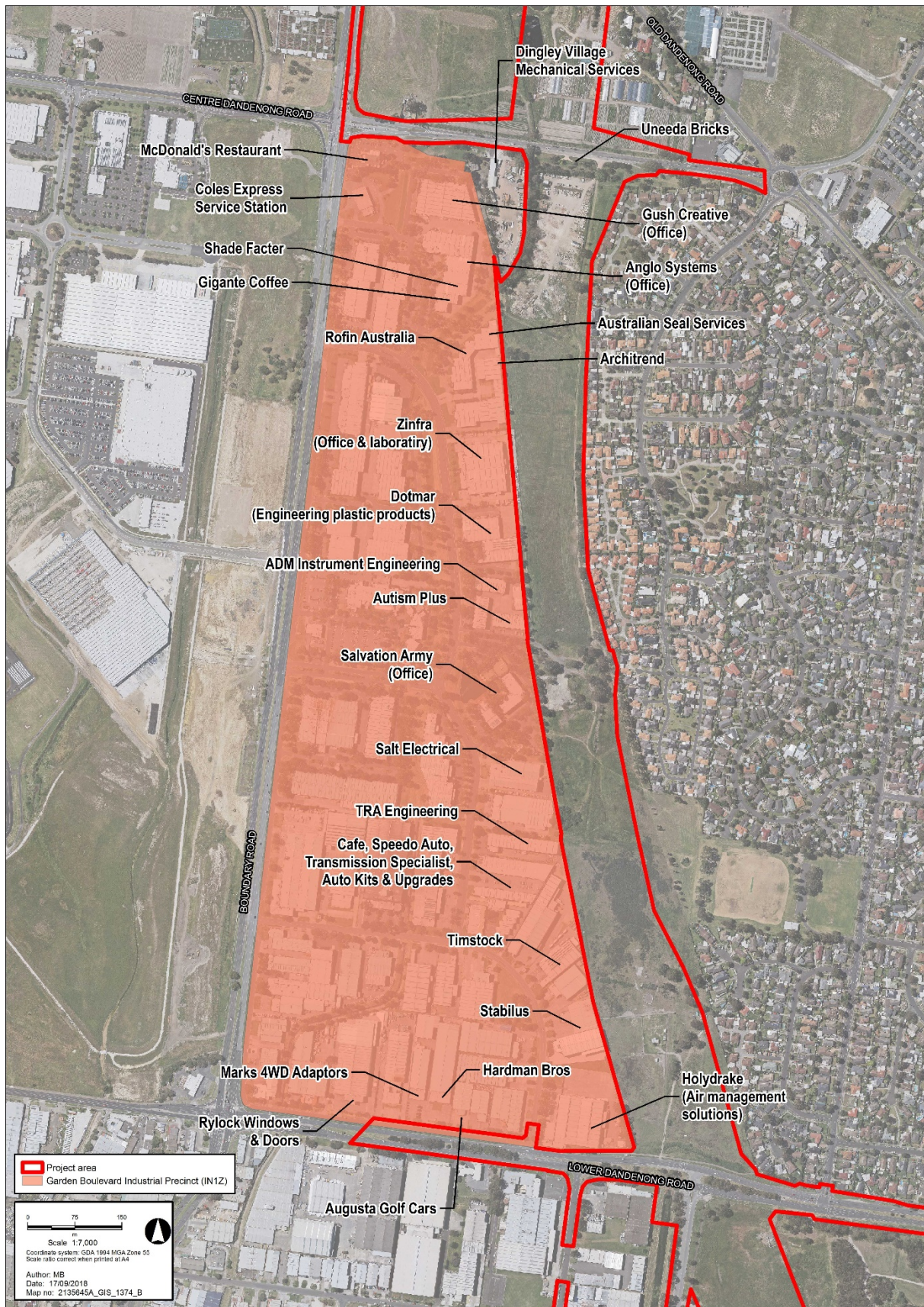


Figure 20.3 **Precinct 3: Garden Boulevard Industrial Precinct**

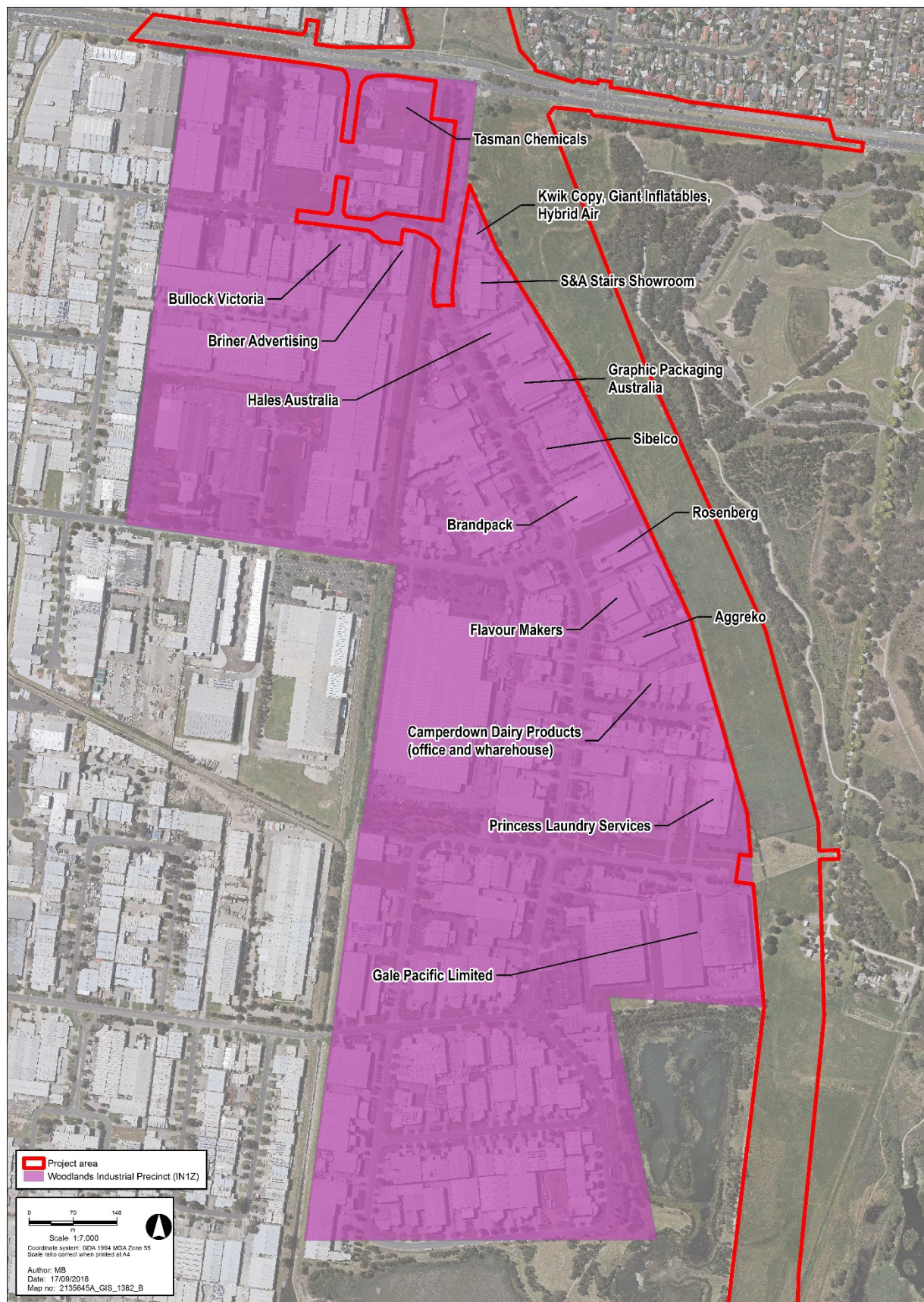


Figure 20.4 Precinct 4: Woodlands Industrial Estate

Access to businesses during construction (Risk R-E3)

Vehicle access to properties and parking may be restricted during construction. These restrictions may have minor economic flow-on effects for businesses in the precinct, such as a downturn in revenues, particularly those in warehousing and logistics. This will potentially be an issue of concern for the following businesses that border the construction areas:

- Morrison Commercial (62 Tarnard Drive)
- Industrial Warehouse property (63-67 Tarnard Drive)
- Braeside McDonalds Restaurant
- Dingley Village Mechanical Service
- BR Demolitions
- Kwik Copy
- Giant Inflatables
- Hybrid Air.

Access to properties within the Moorabbin Airport Precinct will be impacted during construction by the temporary closure of Centre Dandenong Road. Economic repercussions will be the greatest for large format retailers and logistics/warehousing businesses in this precinct.

Impacts on business access and parking will be managed and minimised through the development and implementation of a Business Disruption Plan (EPR E1). The Plan will ensure careful transport planning is undertaken prior to road closures and that alternative access is provided where necessary. A process for early communication with traders and businesses regarding changes to road conditions and the timing/nature of construction works will also be implemented under the Plan. This will be supported with early and consistent engagement, in line with an approved Community and Stakeholder Engagement Management Plan (EPR S1).

20.8.2 Operation

Risk R-E4

The establishment of the project would cut off access via Junction Road and Grange Road to Hawthorn Football Club, Delta Force Paintball and Monk Wholesale Soils. The proposed extension of Tarnard Drive to connect with Woodlands Drive will result the industrial/warehouse property, located at 63–67 Tarnard Drive experiencing permanent loss or reduced access, impacting the operations of any potential tenant and resulting in a reduction of the property's rental yield. According to the owner, the ability of trucks to back into the warehouse and load and unload freight is a crucial requirement, given the property's fit-out as a warehouse. MRPA will ensure that access is maintained at this property; however, compensation will be agreed to with the owner of the land in accordance with LAC Act.

The introduction of a full diamond interchange at Lower Dandenong Road, as part of the Project, will improve service for traffic accessing the Woodlands Industrial Estate. However, the proposed connection between Tarnard Drive and Woodlands Industrial Estate will impact on street parking along Tarnard Drive and at existing properties. Replacement angle carpark along Woodlands Drive north of Tarnard Drive are being proposed as part of the project.

Once operational, the Bell Grove and Lower Dandenong Road intersection access will be restricted from the west onto Bell Grove and from Bell Grove to the east on Lower Dandenong Road. This will result in some flow-on impacts to the operational efficiency and some loss of parking space at the businesses located at 414-426 Lower Dandenong Road, Braeside and 1-7 Bell Grove, Braeside on the western and eastern sides of Bell Grove at the intersection. MRPA will develop appropriate access and parking arrangements in consultation with the affected businesses.

The development of the project may result in a reduction of traffic on Wells Road. This is likely to have a negative impact on a small number of businesses that have some reliance on passing trade. These businesses include food and beverage establishments (take-away, cafes, bakeries) showrooms and a service station. However, most businesses located on Wells Road can be considered as industrial or commercial offices/medical establishments that will generally not be negatively affected by the reduction in traffic volumes.

Potential benefits to the regional economy attributed to the operation of the project are outlined below:

- Enterprises close to the project will have better access to Melbourne's freeway and highway network, which could drive:
 - an increase in the size of employee catchments for enterprises, enhancing businesses' access to employees with more varying qualifications, skillsets and experience
 - an increase in the trading catchments of enterprises, especially for the large-format retailers in the Moorabbin Airport (DFO, Costco) that trade to large regional catchments
 - enhanced distribution networks of industrial enterprises, noting that the largest benefits will be experienced by businesses with significant a logistical component to their operations.
- Improved access to the Monash National Employment and Innovation Cluster and Dandenong National Employment and Innovation Cluster.
- A more balanced transport network solution in South-East and Bayside regions of Melbourne due to the shared pedestrian and cycle path along the project alignment.

20.9 ENVIRONMENTAL PERFORMANCE REQUIREMENTS (EPRs)

Table 20.4 outlines the EPRs relating to economic management.

Table 20.4 Environmental performance requirements

EPR number	Environmental performance requirements	Project phase
E1	<p>During design and construction, impacts on local businesses must be minimised through the preparation and implementation of a Business Disruption Plan. The Business Disruption Plan will be consistent with an approved Community and Stakeholder Engagement Management Plan (EPR S1) and include:</p> <ul style="list-style-type: none"> • transport planning prior to road closures to minimise impacts on business access and parking (EPR T1) • a process for communication with traders and businesses • management of potential amenity impacts during construction and operation (EPR AQ1, AQ2, NV2, and NV3). 	Design, Construction
E2	<p>Utility assets</p> <p>Through detailed design and construction, the impacts on utility assets must be minimised to the extent practicable including, but not limited to:</p> <ul style="list-style-type: none"> • stormwater and sewer assets • electricity transmission assets (overhead and underground lines) • gas and fuel pipelines • communications lines (e.g. fibre optic cables). <p>If relocations are required to facilitate the project, utility assets must be protected and, where required, modified to the satisfaction of the asset owners.</p>	Design, Construction

20.10 CONCLUSIONS

The project study area has observed strong population growth in past years, with this trend expected to continue. Forecast population growth in the study area would place pressure on the main transport network, and highlights the need for the project.

Six precinct areas were identified within the study area. These precincts contain businesses with potential to be impacted by land acquisition, or in the construction and/or operational phases of the project. Existing business and enterprise activities within these precincts include agriculture (market gardens), retail and wholesale horticulture, retail and service stations, and industrial and commercial.

Economic benefits identified include the potential for elevated exposure to passing trade for businesses accommodated by land abutting the proposed project, as well as increased efficiencies and connectivity in the transport network because of the project once it is operational. Overall, the project is expected to generate a range of economic benefits for South-East Melbourne, including improved access to key economic and employment nodes and a more balanced transport network.

The economic assessment identified that enterprises with the most potential to be impacted by the project are in the Green Wedge Zone 2 Precinct, Garden Boulevard Industrial Precinct and Woodlands Drive Industrial Precinct. During construction, the enterprises located within the Moorabbin Airport will be impacted by the temporary closure of Centre Dandenong Road, they are expected to experience an uplift to business revenues due to improved efficiencies in product distribution and an increase in trading catchments. No significant impacts were identified for enterprises at the Governors Road Industrial Node or Chelsea Heights Node.

Impairment of access was the most common potential impact identified. Other potential impacts include land acquisition and amenity impacts, both of which may impact on the viability of business operations which will be managed through the development and implementation of a Business Disruption Plan (EPR E1) and early and consistent engagement with relevant stakeholders.