



THE MCKELL INSTITUTE

Activating the Harbour City

The case for
**AN OPERA HOUSE to
PARRAMATTA PATHWAY**

DISCUSSION PAPER

LILIANA TAI

OCTOBER 2020

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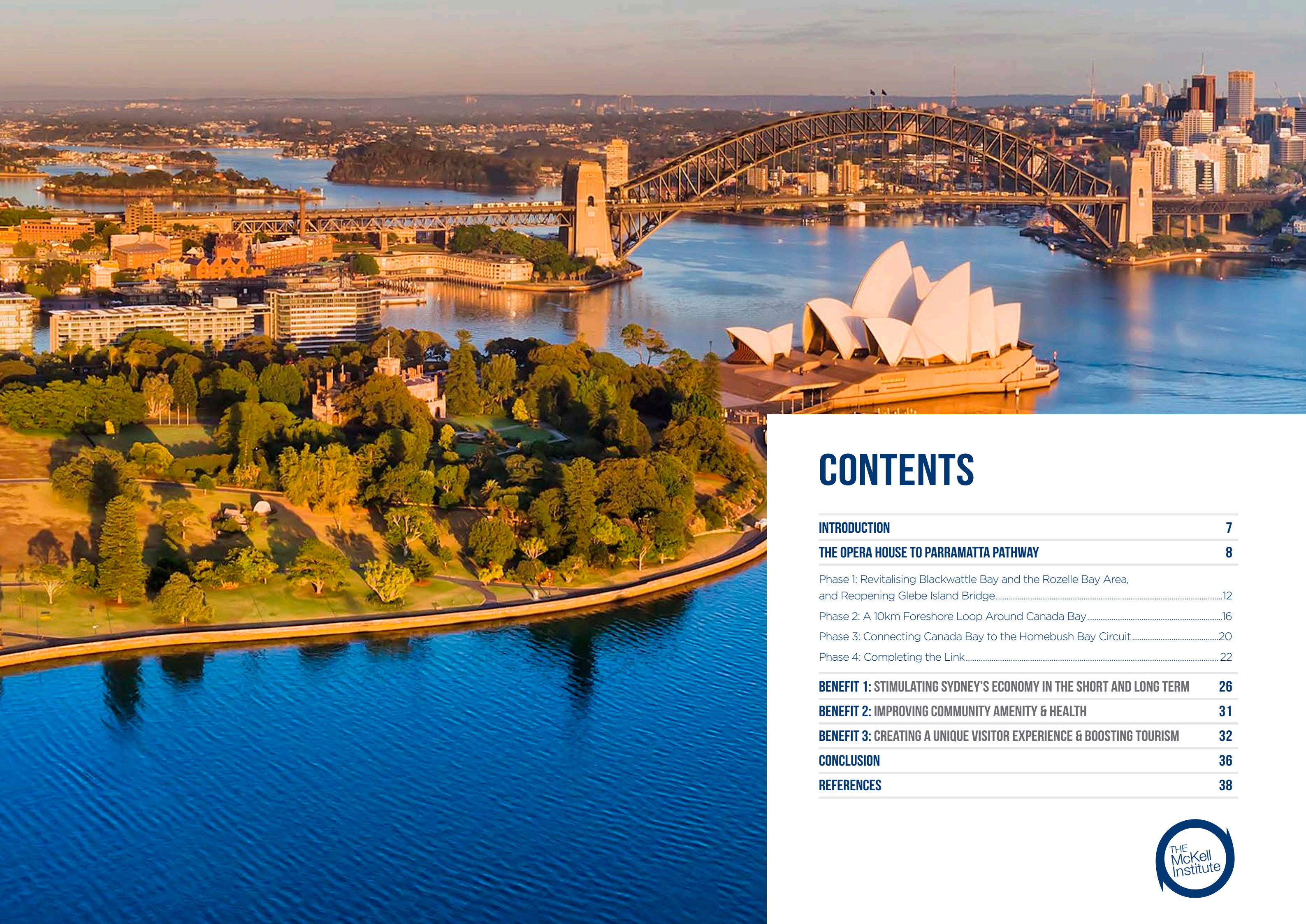
T H E M C K E L L I N S T I T U T E

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FOREWORD

The COVID-19 pandemic has been a tragic imposition on Australia's physical and economic well-being. New South Wales has not been immune, with over 50 residents tragically losing their lives, hundreds of thousands in the state out of work, and thousands of businesses shuttered.

Keeping New South Wales' residents safe must remain the priority for policymakers. But as the pandemic continues, the NSW Government must also begin the difficult task of revitalising the state's economy.

The post COVID-19 recovery will be, in large part, driven by significant investment from governments at all levels. Wherever possible, the stimulatory projects governments back should also strive to make the New South Wales economy stronger, more resilient, and more dynamic than it was before.

This discussion paper tables one idea that could help shape New South Wales' post-COVID recovery: an unbroken foreshore walkway from Sydney's iconic Opera House through to the Parramatta CBD. The project is aimed at facilitating job creation, reinvigorating daily life, and creating new attractions to reanimate the local tourism economy.

Sydney's unique geography is among its best assets. But its harbour and Parramatta River foreshore is often underutilised. The proposed Opera House to Parramatta Pathway seeks to address that, capitalising on Sydney's natural advantages to deliver improved tourism and active transport infrastructure for Sydney's visitors and residents.

This project would deliver three key benefits to Sydneysiders. First, it would create jobs in the immediate and long-term during construction and maintenance, and in associated economic activity from tourism.

Second, the proposal would lead to considerable health benefits for those who utilise the new pathway, with greater access to cycling and walking infrastructure known to directly benefit the wellbeing of those who utilise it.

And third, this project will further galvanise Sydney's reputation as a global tourism destination, creating a unique experience for visitors and ensuring Sydney remains competitive in the diminished global tourism market that will emerge after COVID-19 subsides.



SAM CROSBY
CEO, MCKELL INSTITUTE

INTRODUCTION

With Australia, and indeed the world, currently facing a generation defining event, the COVID-19 pandemic, Sydney needs ambitious and innovative infrastructure projects that will help drive our economic recovery and shape the city's future.

This Discussion Paper outlines a proposal to deliver to Sydneysiders, for the first time, continuous foreshore access from the iconic Sydney Opera house to the rapidly expanding geographic centre of Sydney, Parramatta CBD.

The proposal would deliver:

- 80 kilometres of continuous foreshore access, from the Opera House, The Bays Precinct including Blackwattle Bay, the new Sydney Fish Market, White Bay Power station, Canada Bay to Parramatta River.
- Between 1645 and 3145 new jobs created over the lifetime of the project that would have a positive ripple effect through the State's economy.
- A new recreational space for 90,262 residents living in the 18 adjacent suburbs and ultimately, improve health outcomes for these communities.
- A new tourism destination for Sydney that could potentially attract several hundred thousand additional international and domestic tourists each year, and bring over \$150 million in localised economic activity per year to the project area.

This proposal sets out a staged approach for the delivery of this social infrastructure.

Phase 1, 2 and 3 of the project's development would see the construction of two new waterfront routes in Sydney's Inner West — one in Rozelle Bay and one in Canada Bay — and the connection of these pathways to the Homebush Bay Circuit, creating immediate economic and health dividends for those local communities.

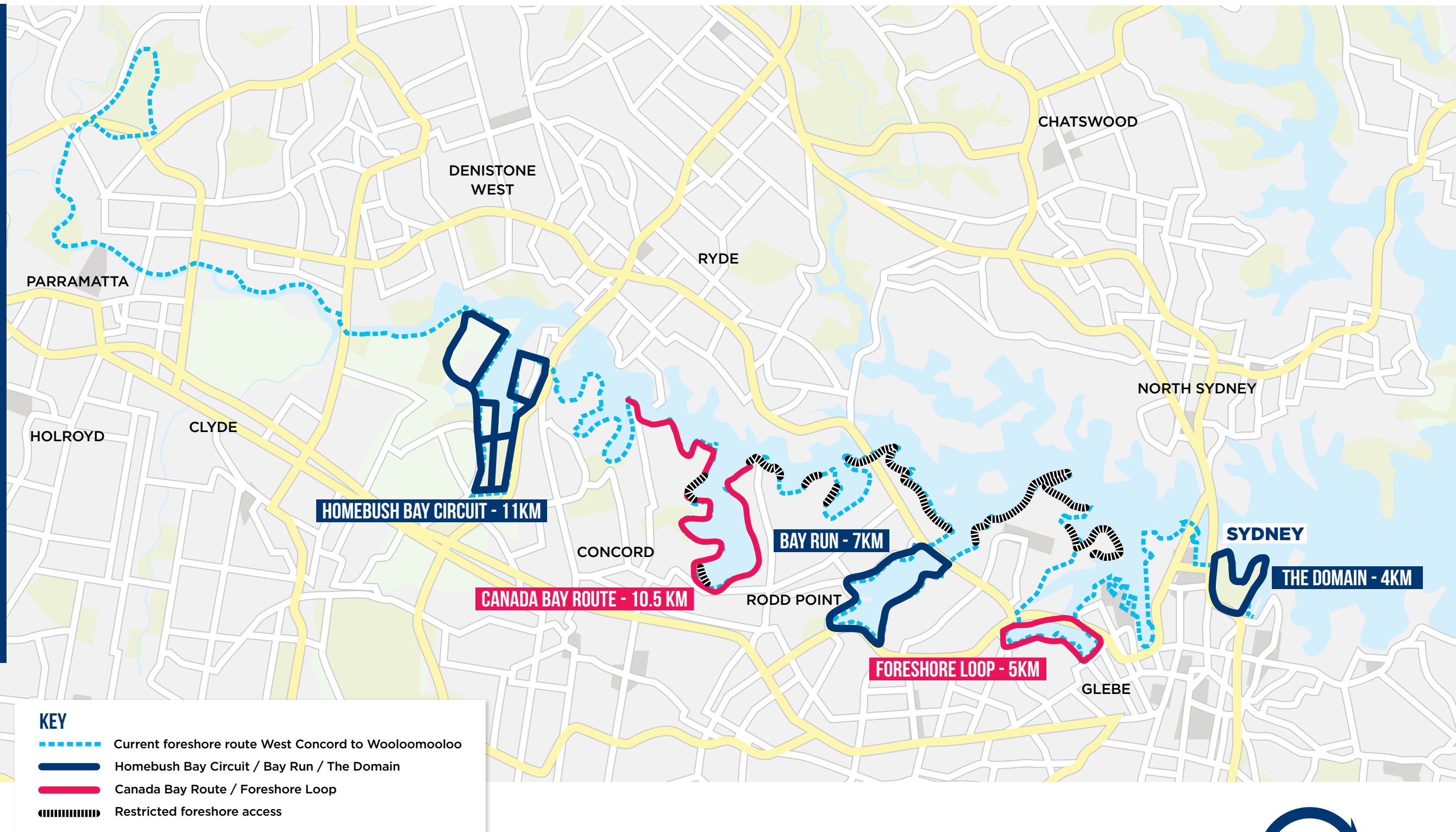
Phase 4 would see the pathway completed, delivering a direct pedestrian and cycling route from the Opera House to Parramatta, and creating Australia's longest unbroken foreshore pathway in the process.

The Opera House to Parramatta Pathway

FIGURE 1 THE SYDNEY OPERA HOUSE TO PARRAMATTA PATHWAY, PROPOSED ROUTE.

KEY POINTS

- 1 Sydney and NSW's economy has taken a hit from COVID-19, creating a need for bold, innovative and job-creating infrastructure projects.
- 2 An Opera House to Parramatta Pathway will serve as a marquee initiative of Sydney's post-COVID recovery, revitalising communities, creating local jobs, and reanimating Sydney's tourism economy.
- 3 Construction of the Opera House to Parramatta Pathway can commence quickly, and begin to deliver immediate construction jobs for NSW residents.



Sydney has one of the most iconic harbours in the world. Its natural access to small bays, rivers and oceans has contributed to Sydney's consistent ranking as one of the most liveable cities on earth.¹ However, the foreshore, particularly along the Parramatta River, has considerable untapped potential.

Of the 80 kilometres of foreshore from Woolloomooloo to Parramatta, only 22 kilometres has been developed into pedestrian infrastructure.²

Creating an unbroken pedestrian and cycling pathway extending from the Parramatta CBD through to the Sydney Opera House would take full advantage of Sydney's unique geography, and serve as a marquee initiative of the NSW Government. This project could help shape Sydney's economic resurgence, creating immediate opportunities for local workers, help deliver productivity enhancing infrastructure that improves the long-term health of Sydneysiders, and provide a new attraction and experience for tourists.

Walkways, harbour access and pathways are central elements of recent major Government strategies and plans. The Greater Sydney Commission's *A Metropolis of Three Cities* projects a vision for "a network of walking and cycling links".* Specifically, it articulates the need for "reinstated public foreshores along the Parramatta River".** The *Three Cities* plan foresees a *Harbour City* and a *Central River City*. This walkway would connect the two along the foreshore, fulfilling the vision of the *Metropolis*.

FIGURE 2 EXISTING FORESHORE INFRASTRUCTURE, AND A PROPOSED LOOP BY THE FISH MARKETS (RED).

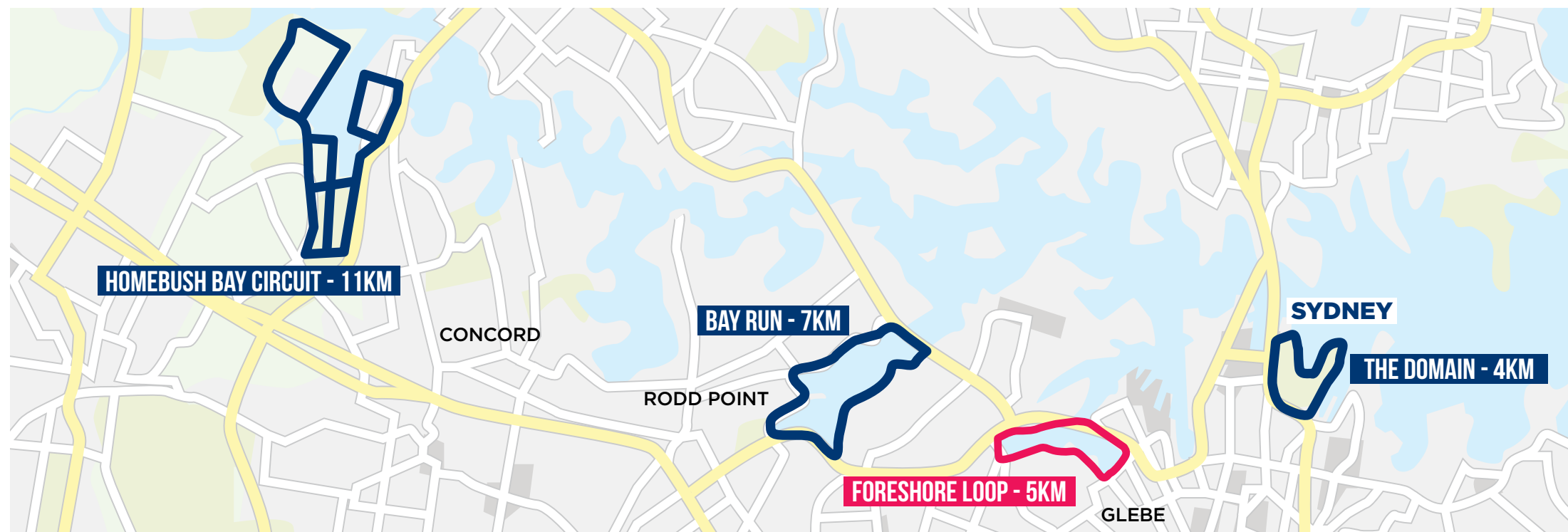
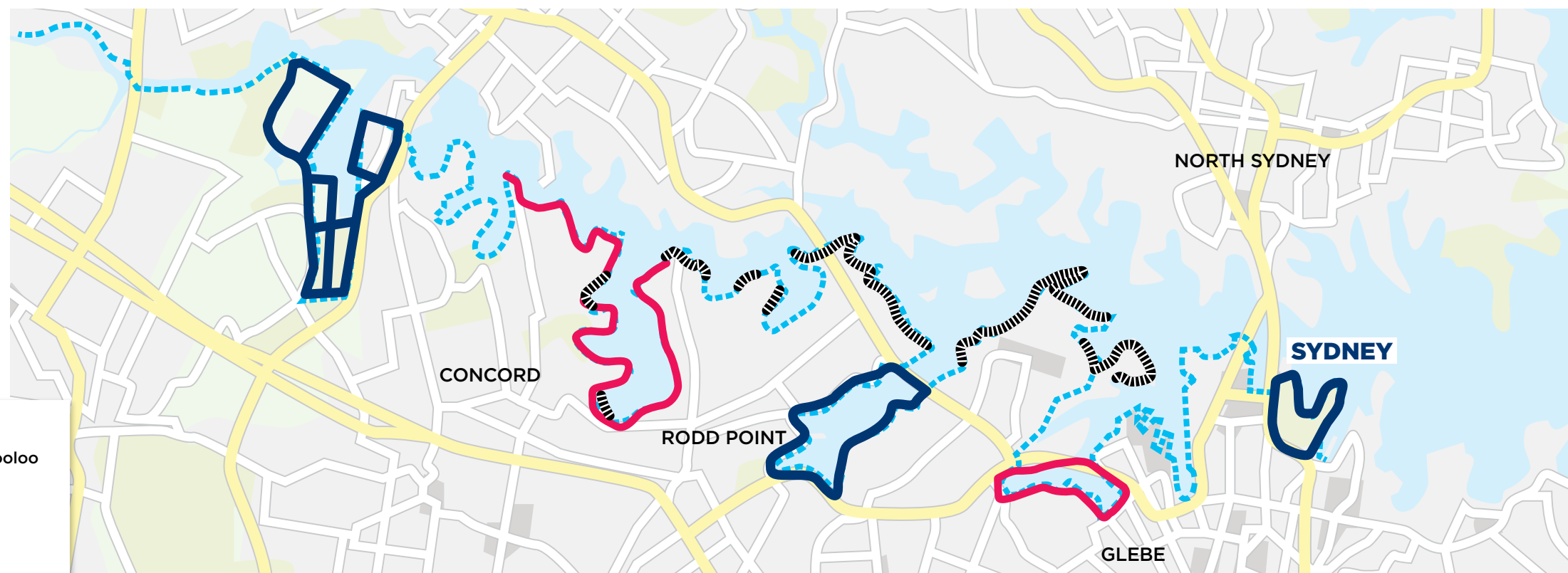


FIGURE 3 EXISTING FORESHORE INFRASTRUCTURE, AND A PROPOSED LOOP BY THE FISH MARKETS (RED).



KEY

- Current foreshore route West Concord to Woolloomooloo
- Homebush Bay Circuit / Bay Run / The Domain
- Canada Bay Route / Foreshore Loop
- ||||| Restricted foreshore access

* <https://gsc-public-1.s3-ap-southeast-2.amazonaws.com/greater-sydney-region-plan-0618.pdf?pmBpYxwen5IHg4GSB6td4yKiKVogFi4c> Page 6

** <https://gsc-public-1.s3-ap-southeast-2.amazonaws.com/greater-sydney-region-plan-0618.pdf?pmBpYxwen5IHg4GSB6td4yKiKVogFi4c> Page 149

PHASE 1:
REVITALISING
BLACKWATTLE BAY
AND THE ROZELLE
BAY AREA, AND
REOPENING GLEBE
ISLAND BRIDGE



FIGURE 4
THE BLACKWATER BAY AND ROZELLE BAY AREA CITED FOR REVITALISATION IN PHASE 1 OF THE PROJECT.



The first phase would see the completion of the NSW Government's Bays Waterfront Promenade as part of its urban transformation plan for The Bays Precinct.

The Government has previously committed to delivering a 5.5km continuous, waterfront promenade from Balmain to Pyrmont as a priority. Planning for the first stage of this promenade is underway as part of master planning for Blackwattle Bay and construction of the new Sydney Fish Market.

**The Government's plans for
The Bays Precinct also commits to:**

"Reconnecting Balmain to Pyrmont by working towards the adaptive re-use of Glebe Island Bridge."

Phase 1 of our proposal would also see the Glebe Island Bridge repaired and re-opened, with a greenway connecting Wentworth Park to Rozelle Rail Yards installed. The Glebe Island Bridge is a heritage-listed disused swing road bridge. Once revitalised, the bridge would connect the Bays Precinct with Blackwattle Bay and Pyrmont. The Bridge is one of the last remaining swing bridges of its type in Australia and the world.³ The estimated cost for revitalising the bridge is around \$43.6 million.⁴ This is in line with the *Bays Precinct Transformation Plan*, proposed by Urban Growth NSW.⁵

A re-opened Glebe Island Bridge would complete a 5 kilometre loop, providing a safe pedestrian and cyclist pathway that facilitates more active modes of transportation and provides more green spaces that will improve the experience of residents and visitors. Importantly, this would provide direct connectivity to the Sydney CBD for local residents, with the commuting distance between Rozelle Bay and the CBD estimated to be around 2.7km. The pathway would provide connection to Glebe Island's technology and business precinct, Sydney Fish Market and the

new neighbourhood in Blackwattle Bay. It will also provide vantage points to observe Sydney's unique and authentic working harbour.

The construction of this pathway is estimated to cost \$57 million.⁶ Combined with the Glebe Island Bridge revitalisation, Phase 1 is estimated to cost approximately \$100 million, leading to the creation of around 295 direct jobs and 170 indirect jobs.⁷

There is already significant community support for this walking loop and the re-opening of the Glebe Island Bridge. Public consultation carried out on the Bays Precinct showed:

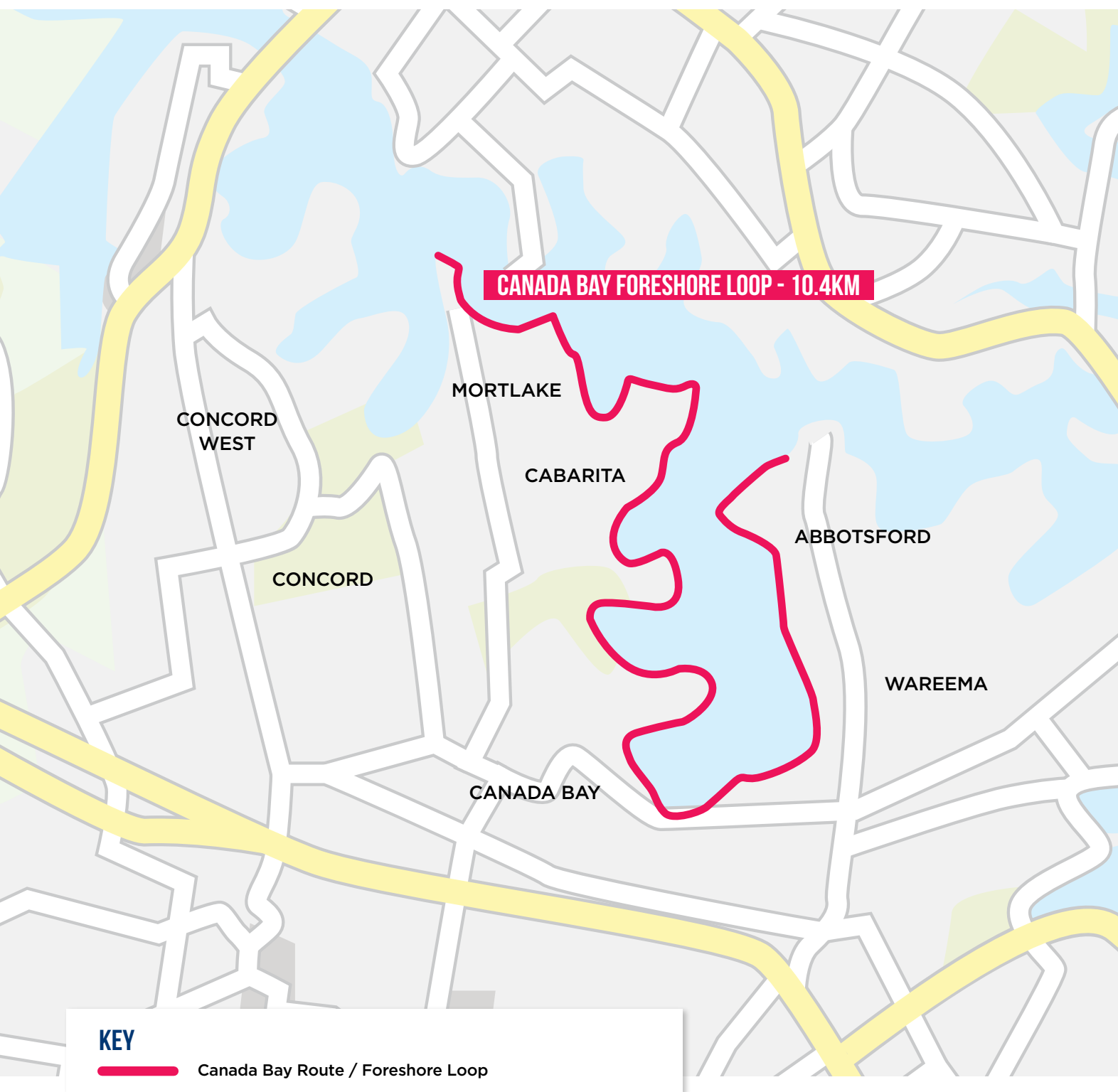
"There was significant support for the development of a continuous waterfront promenade... The most common comment received was to include the Glebe Island Bridge as part of the Bays Waterfront Promenade. The contribution the Promenade could make to public benefit and as an important connector for mass and active transport were the other key themes for this destination." *

* (<https://thebayssydney.nsw.gov.au/assets/Discussion-Paper-Public-Feedback/Discussion-Paper-Consultation-2015.pdf>)

PHASE 2:
A 10KM
FORESHORE LOOP
AROUND
CANADA BAY



FIGURE 5 CANADA BAY FORESHORE PATHWAY PROPOSAL.



Phase 2 would see the construction of a 10 kilometre foreshore loop around Canada Bay, which stretches from Abbotsford to Breakfast Point.

This loop would wrap around the foreshore of the Parramatta River and could connect up with the highly popular Bay Run to create one of the longest connected pathways in Sydney. This infrastructure could further enhance Sydney's access to the waterfront and provide a scenic mode of active transport for those in Sydney's growing Inner-West.

A large stretch of this foreshore is already open for public recreational use and is popular with Sydneysiders. Extending this route would cost approximately \$110 million dollars, however, is complicated by private residences that may be impacted by this phase of the project. In total, there are 75 homes in this section of construction with private access to the waterfront that need to be negotiated with to unlock over 10 kilometres of foreshore.

PHASE 3: CONNECTING CANADA BAY TO THE HOMEBUSH BAY CIRCUIT



FIGURE 6 THE 6.25 KM STRETCH OF PROPOSED FORESHORE PATHWAY CONNECTING CANADA BAY TO THE HOMEBUSH BAY CIRCUIT.



Once this bay loop has been constructed, a 6.3 kilometre extension can be built extending the path West to connect this pathway to the existing Homebush Bay Circuit and Parramatta River Walk, extending the foreshore pathway from Canada Bay to Parramatta. This section of the proposed project is home to some of Sydney's most desirable waterfront areas, and home to a rapidly growing population.

Already, there is a 9.8 kilometre walking trail, the Concord Foreshore Trail, that stretches from McIlwaine Park in the suburb of Rhodes to Majors Bay Reserve in Concord.

PHASE 4: COMPLETING THE LINK



FIGURE 7 THE 18.3 KM SECTION CONNECTING ROZELLE BAY AND CANADA BAY.

Connecting the proposed routes described in Phase 1, 2 and 3 with the existing Bay Run will finalise the completion of 80 kilometres of uninterrupted pathway between Sydney Opera House and the Parramatta CBD.

An alternate proposal is to construct a green corridor that stretches from Wentworth Park, through Rozelle Bay to Callan Park. This 4.5km linkage route offers an alternative to the route along Balmain's coastline, which consists of multiple residential properties that may prove difficult to navigate, as it passes by attractive potential tourist destination and assets, such as heritage listed buildings, Callan Park, and Birkenhead Point. Moreover, this corridor would provide access to three public parks in the area. The final length of Phase 4 will be approximately 18.3km and connects the Rozelle Bay to Canada Bay.

BENEFIT 1

STIMULATING SYDNEY'S ECONOMY IN THE SHORT AND LONG TERM

KEY POINTS

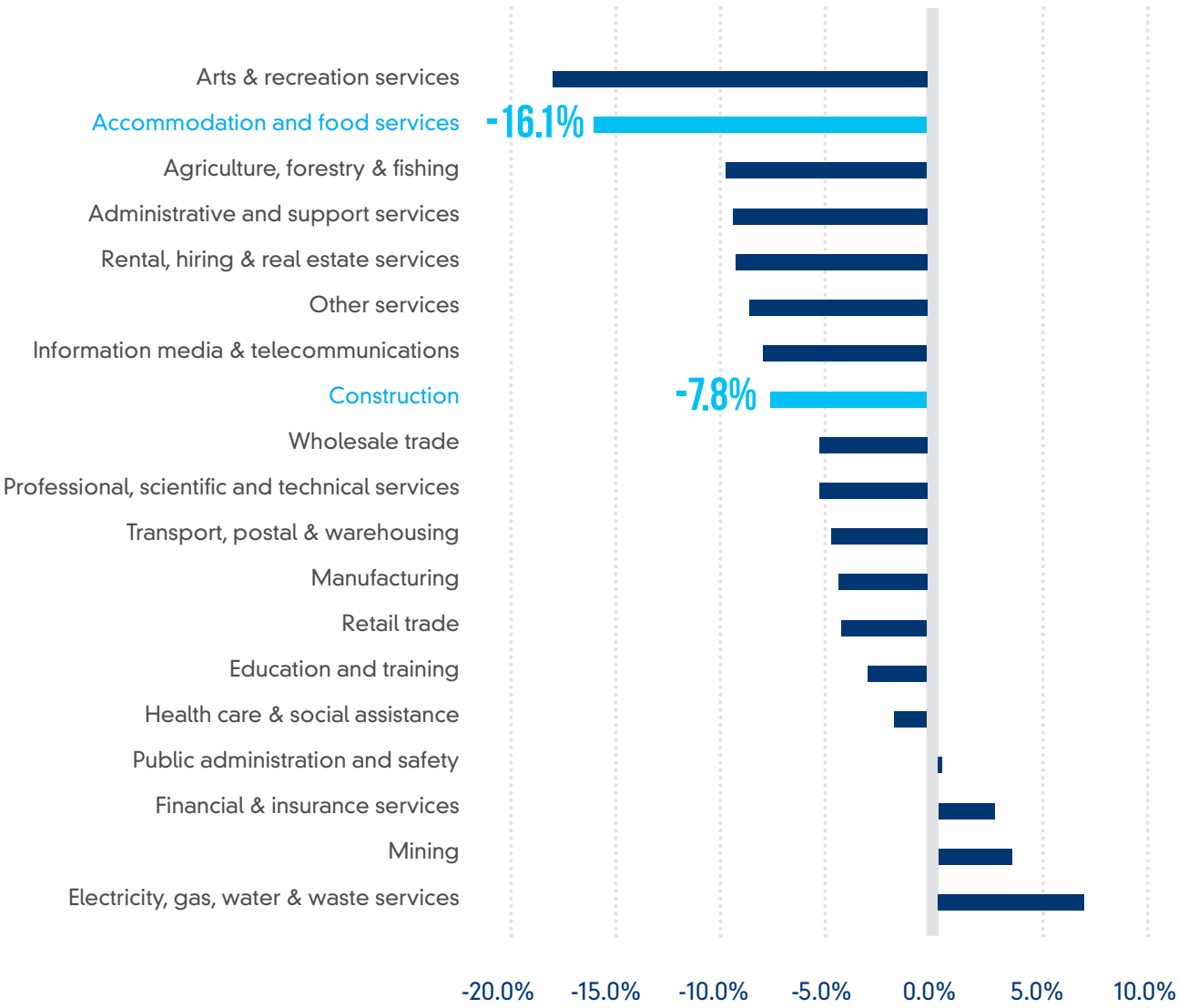
- 1 Sydney and NSW's economy has taken a hit from COVID-19.
- 2 The Opera House to Parramatta Pathway can commence quickly, and begin to deliver immediate construction jobs for NSW residents.
- 3 The initiative also has longer-term economic benefits, such as increasing tourism activity and improving community health.



The Opera House to Parramatta Pathway will expedite the economic recovery in New South Wales after COVID-19, providing an immediate stimulatory affect in the construction industry, creating long-term productive infrastructure that will make Sydney more competitive, and facilitating new jobs in the accommodation and foods services sector as a result of an expected boost in tourism.

Over 265,000 NSW residents who have lost their jobs since the pandemic began.⁸ In NSW, the construction industry is among the worst hit industries, with 7.8% fewer jobs in mid-July as compared to mid-March.⁹ This decline represents around 7,100 construction workers who have lost their jobs.

FIGURE 8 CHANGE IN PAYROLL JOBS SINCE WEEK ENDING 14 MARCH BY INDUSTRY, NSW



Source: ABS Catalogue 6160055001

Prior to COVID-19, construction was the 7th largest industry in NSW, employing over 91,000 workers.¹⁰

It is proposed that this project in completed in phased construction periods. Delivering the project in stages will both minimise disruption to local communities, and enable local and smaller subcontractors to bid manageable sections of the project. Local and State Governments should work to prioritise local contractors where possible to maximise the local economic benefits of the projects' construction phase.

The project could create up to 1474 ongoing jobs*

This project has the benefit of creating significant immediate employment opportunities, while delivering long-term productive infrastructure that has the potential to draw significant tourism activity, benefiting the tourism and accommodation and foods services industries locally.

CONSTRUCTION PHASES	ESTIMATED COST	FTE JOBS EXPECTED
Low	\$200 million	1039
High	\$300 million	1671

The construction phase is estimated to cost between \$200 million and \$300 million, with a combination of state and local government financing. The construction phase is estimated to generate between 1039 and 1671 jobs over a three year, four-phase construction process.

ONGOING ACTIVITY	TOTAL ACTIVITY	FTE JOBS EXPECTED
Low Economic Activity Estimate	\$63 million per year	616
High Economic Activity Estimate	\$151 million per year	1474

TOTAL JOBS BENEFIT	LOW ESTIMATE	HIGH ESTIMATE
Number of Jobs	1645	3145

In aggregate, including construction phase and ongoing associated economic activity, the project is expected to create a minimum of 1645 jobs, with potential to create as many as 3145 jobs across the duration of the project.

* Author-calculated using an input-output model targeted specified to the LGAs along the foreshore.



BENEFIT 2

IMPROVING COMMUNITY AMENITY & HEALTH

KEY POINTS

- 1 'Active transport' is key to the physical and mental health of the community.
- 2 Significant barriers prohibit Sydneysiders from walking or cycling to work and recreational activities – further infrastructure is required.
- 3 The Opera House to Parramatta Pathway will provide opportunities for Sydneysiders and visitors to engage in active, healthy commuting.

More than 3 million walking trips are taken every weekday in metropolitan Sydney and this will exponentially increase as Sydney's population continues to grow.¹¹ By 2050, approximately 2 million people are expected to visit Sydney's CBD each day.¹² Well-designed pedestrian infrastructure is crucial to managing these large numbers and easing congestion, in addition to offering a healthy active transport alternative to commuters.

There are a number of benefits for individuals who opt to walk or cycle, including health benefits derived from exercise as well as individual cost savings. Moreover, there are a large number of positive externalities for society including less congestion on roads, reduction in public health problems like obesity, reduced greenhouse gas emissions and less air pollution and noise.

Transport for NSW has highlighted the deterrents for people from choosing to walk.¹³ One of the key reasons cited is the lack of direct walking routes and suitable pathways. This is particularly the case when there are no direct walking routes that connect public transport to city centres. Other concerns include pedestrian safety and security, a lack of personal fitness, and environmental factors like bad weather.

Many of these barriers overlap with the barriers to cycling. Cycling often requires even more infrastructure investments as bike lanes need to be constructed to ensure safe passage for cyclists and parking bays for bicycles need to be available.

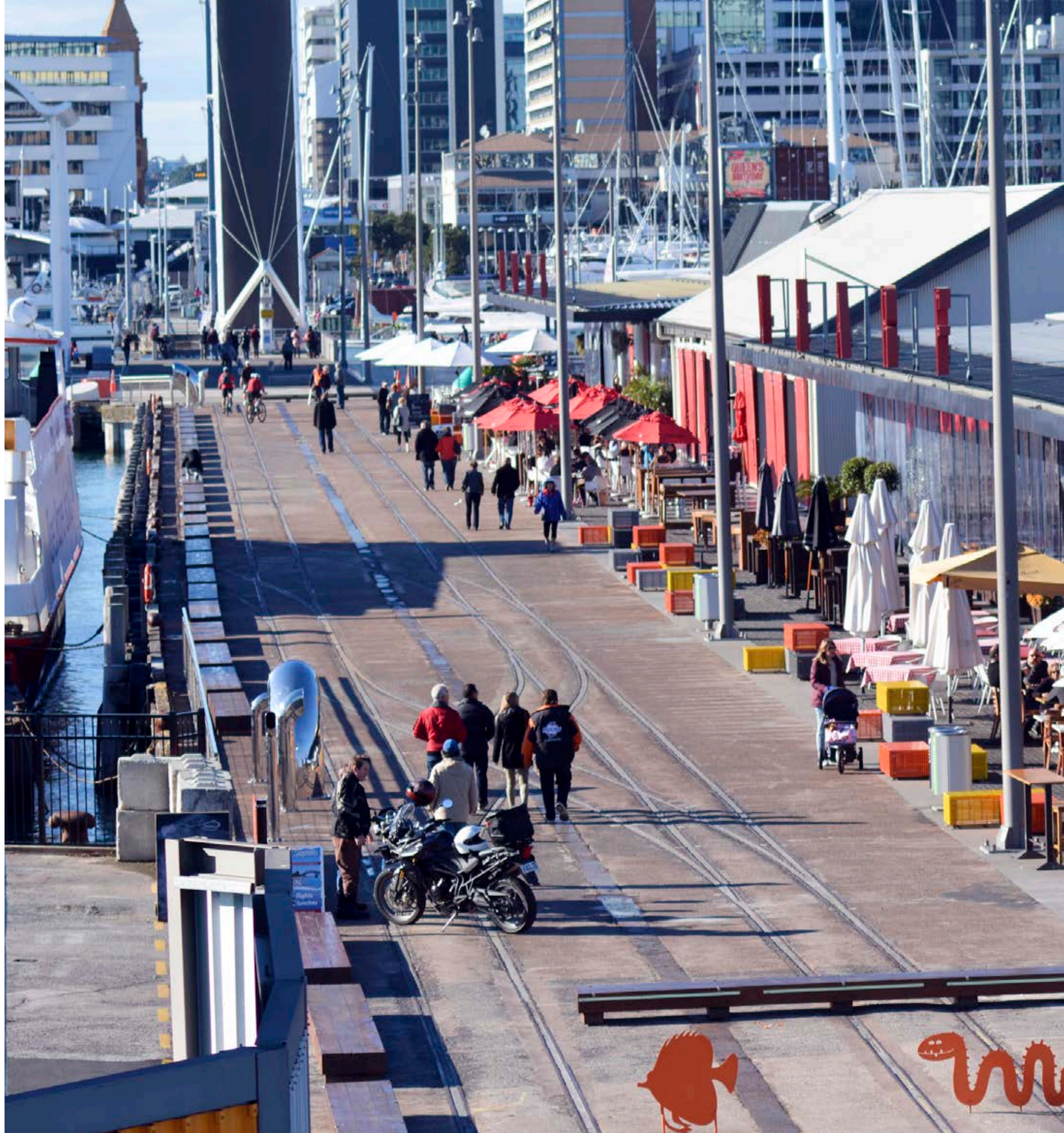
All these impediments can be addressed with adequate government attention and planning. Improvements in pedestrian infrastructure and greater social messaging encouraging individuals to walk and cycle must be made to overcome these barriers and augment the previously discussed benefits. The Opera House to Parramatta Pathway addresses many of these issues, and provides an alternative commuting pathway for the people of Sydney.

BENEFIT 3

CREATING A VISITOR EXPERIENCE & BOOSTING TOURISM

KEY POINTS

- 1 The global tourism industry has been decimated by COVID-19 – but it will recover.
- 2 Sydney must position itself to be remain a premier destination once international and domestic tourism re-emerges.
- 3 A marquee initiative such as the Opera House to Parramatta Pathway will encourage visitors to pick Sydney, aiding NSW's economic recovery.



Tourism has been acutely impacted by COVID-19, with Australia’s international arrivals falling to near zero, and domestic tourism effectively paused as a result of the lockdowns. For Sydney to continue to attract international and domestic visitors, it must create new experiences on par with the best attractions from around the world.

The Southern Waitemata Harbour in Auckland, New Zealand has recently begun construction of a walkway in collaboration with the Maori people. The Waterfront Plan outlined by Auckland Council includes a 10km promenade and cycleway that will stretch along the edge of the waterfront.¹⁴ Public green spaces are also included in the plan with 4.5 hectares of waterfront park space to be built on Wynyard Point. This project will not only improve the number of residents and visitor who can partake in active travelling, but will also directly support 20,000 new fulltime jobs in Auckland and will contribute indirectly to a further 20,000 jobs across the region.¹⁵

Similarly, Chicago unveiled in 2018 a 5.5km pedestrian waterfront pathway located on the south bank of the main branch of the Chicago River in downtown Chicago.¹⁶ The Chicago Riverwalk was expanded in 2015 and saw the addition of various new spaces and pedestrian infrastructure such as the Boardwalk which is an accessible walkway that creates continuous access to Lake Street and sets the scene for future development.¹⁷

This re-development saw the direct creation of over 200 jobs and doubled the number of Riverwalk vendors and increased profits by 164% from 2014 to 2018.¹⁸ The re-development has also catalysed over \$12 million in funding for the redevelopment of earlier phases of the Riverwalk.¹⁹

To remain internationally competitive in the tourism market, Sydney needs to make the most of its unique natural geography. Untapping the potential of the Parramatta River foreshore would lead to the creation of a world-class tourism asset that will have

considerable economic and cultural benefits for the people of Sydney.

There is clear evidence of demand for more foreshore walkways, both from Sydney locals and from tourists. The recent *Greater Sydney Outdoors Study* surveyed Sydney residents about their attitudes and activities. Of the millions of Australians who live close to this part of the foreshow, 88% regularly walk, hike, jog or run. Not only that, but the population is estimated to grow significantly – increasing the demand for outdoor corridors. In general, Sydneysiders like to run and walk along the water. According to data from running app *Strava*, 4 out of the 5 most popular running routes in Sydney are along the Sydney foreshore.

Furthermore, tourists enjoy these walks too. The Bay Run, the Bondi-Coogee walk, and the Opera House walk all consistently rank among Sydney’s most popular tourist attractions according to data from *TripAdvisor*.

At least 20,000 local users per day would be expected

There is clear evidence of demand for more foreshore walkways, both from Sydney locals and from tourists. The recent *Greater Sydney Outdoors Study* surveyed Sydney residents about their attitudes and activities. One study has identified that 85% of residents in Sydney living near the harbour foreshore regularly walk, hike, jog or run.* According to the same study, Sydney’s population is also slated to grow significantly – increasing the demand for outdoor corridors.

Approximately 90,262 local residents live in close proximity to the proposed walkway. If a quarter of those who regularly walk/jog decided to do so on the proposed walkway, the walkway would feature a minimum of 19,000 patrons per week from local visitors alone.** This would result in an approximate annual patronage of nearly a million visitors per year from local residents alone.

* The walkway encompasses areas of both the Central City District and the Eastern City District. An average of the two figures of 82% and 88% (85%) is used to approximate the level of walking/jogging along this proposed foreshore.
** Calculated by taking the 85% figure, with population estimates, with a conservative estimate of at least 1 visit per week by a quarter of those regularly engaging.

Residents who live near the proposed foreshore walkway	90,262
% who regularly walk/job	0.25
Estimated number of weekly patrons to the foreshore walkway	19,190
Yearly patrons	997,880

There is little doubt that residents of Sydney generally would too enjoy these walks, in the same way that the popular walks and beaches of Sydney are enjoyed by the broader community. With adequate public transport, parking and entry points, the walk could be enjoyed by thousands of Sydneysiders each day.

The Opera House to Parramatta Pathway would also attract domestic and international tourists. The Bay Run, the Bondi-Coogee walk, and the Opera House walk all consistently rank among Sydney’s most popular tourist attractions according to data from *TripAdvisor*. While difficult to estimate, it can be expected that as tourism recovers post COVID-19, Sydney will

return to having over 14 million tourists annually. Of that, *TripAdvisor* data suggests there would be serious demand for the proposed walkway.

Capturing a modest fraction of Sydney’s tourism market would add over \$100 million in localised economic activity

Sydney is the heart of Australia’s tourism economy. New productive infrastructure that can capture a percentage of the nearly 15 million annual visitors to Sydney has the potential to generate significant local economic activity.

SYDNEY TOURISM PATRONAGE PER YEAR		PERCENTAGE OF TOURIST PATRONAGE
Total	14.72 million	
Western Sydney Parklands	1.9 million	11.5%
Bondi Beach	2.6 million	17.7%

PERCENTAGE OF TOURISM CAPTURE FOR PROJECT	NUMBER OF VISITORS	VALUE ADD APPROXIMATION
5%	736,000	\$45-105 million
5.75% *Half of Western Sydney Parklands	846,000	\$52-119 million
7%	1.03 million	\$63-151 million



CONCLUSION

New South Wales has been challenged by COVID-19. But policymakers must see the need to stimulate and re-grow the state's economy as an opportunity to reimagine what metropolitan Sydney can look like, what it can deliver for its residents, and how it is viewed on the world stage

Capitalising on Sydney's unique geographical assets is a logical way of stimulating construction jobs and boosting the city's tourism infrastructure in the wake of the pandemic.

This paper has advanced the idea of an Opera House to Parramatta Pathway — an 80 kilometre unbroken stretch of foreshore infrastructure that will unleash the potential of the Parramatta River, create local jobs, provide a healthy commuting alternative for Sydney residents, and help Sydney remain competitive in a tough global tourism market.

The project outlined in this report would be implemented over several phases, and ideally be joint-funded by State and Local Governments eager to see renewed post-COVID economic activity along the Sydney foreshore and have the potential to create over 3000 jobs during the project's lifetime.



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