

9.0 Culture, sport and the environment

STRATEGIC OBJECTIVE **Deliver targeted upgrades to the State’s cultural, sporting and environmental infrastructure to drive growth in the visitor economy, realise the economic and social benefits of strong cultural and sporting sectors, and support local participation, creativity and liveability**

- KEY CHALLENGES**
- Revitalise the NSW cultural, sports and tourism economies
 - Maintain the Sydney CBD as a highly attractive, world renowned cultural destination and precinct
 - Move away from ad hoc investment decisions to better target investment towards renewing ageing cultural and sporting infrastructure, strengthening defined precincts, and providing better facilities to more people, particularly in the fast-growing areas of Parramatta and Western Sydney
 - Maintain competitiveness in the events market through investment in stadia
 - Engage in meaningful partnerships with local councils in the cities of Newcastle and Wollongong and across regional NSW
 - Support tourism and environmental initiatives in regional NSW

OPPORTUNITY	KEY Infrastructure NSW RECOMMENDATIONS	COSTS & FUNDING
Better investment planning and renewal of arts and cultural assets	<ul style="list-style-type: none"> • Standardise the investment framework for cultural infrastructure • Develop a whole-of-sector cultural infrastructure strategy • Invest in renewing ageing assets and further developing cultural precincts around the State 	<p>Cost of planning is not material</p> <p>Reservation of \$600 million from the <i>Rebuilding NSW</i> initiative</p>
Sydney CBD Cultural Precinct	<ul style="list-style-type: none"> • Define a Sydney CBD Cultural Precinct , in consultation with the City of Sydney, with priority investment directed to : <ul style="list-style-type: none"> – Sydney Opera House renewal – Walsh Bay Arts precinct – Art Gallery of NSW: Sydney Modern – State Library of NSW • Prior to further public investment being made in the Australian Museum, investigate opportunities for reconfiguration and site optimisation and alignment with the whole-of-sector cultural infrastructure strategy 	<p>See reservation above</p>
Greater access to indigenous art and culture	<ul style="list-style-type: none"> • Support plans for a purpose-built Indigenous Cultural Centre within the Sydney CBD Cultural Precinct at Barangaroo Head Land Park • Promote greater collaboration between institutions housing indigenous collections to create a precinct-wide visitor experience and to enable sharing and consolidation of collections 	
A new Parramatta Cultural Precinct	<ul style="list-style-type: none"> • Plan for and prioritise investment in a new Parramatta Cultural Precinct, based around the Riverside Theatre Complex, the old David Jones site, Parramatta Stadium and the old Kings School • Urgently consider relocation of the Powerhouse Museum to the Parramatta Cultural Precinct • Promote sharing of collections from CBD-based institutions (such as the Australian Museum) with the Parramatta Cultural Precinct 	
Western Sydney cultural hubs	<ul style="list-style-type: none"> • Partner with local councils to develop opportunities for co-investment in new and repurposed cultural infrastructure in Western Sydney, with particular regard to the river cities of Liverpool, Penrith and Campbelltown 	

OPPORTUNITY	KEY Infrastructure NSW RECOMMENDATIONS	COSTS & FUNDING
Regional hubs and precincts	<p>Newcastle and Wollongong</p> <ul style="list-style-type: none"> • Work with the City of Newcastle to attract investment in the city's cultural precinct • Work with the City of Wollongong to enhance the cultural precinct around the Town Hall and Performing Arts Centre <p>Regional NSW</p> <ul style="list-style-type: none"> • Create regional creative hubs and cultural precincts across the State, including utilising digital infrastructure to drive local and tourist visitation and innovative use of existing community infrastructure 	See reservation above
Environmental infrastructure to support tourism	<ul style="list-style-type: none"> • Reserve \$300 million for the Regional Environment and Tourism Program for national parks and regional tourism 	Reservation of \$300 million from the regional allocation in the <i>Rebuilding NSW</i> initiative
Sporting infrastructure	<ul style="list-style-type: none"> • Complete upgrades to the Moore Park sporting precinct, focusing on the Sydney Football Stadium • Review major stadium alternatives in the Parramatta/Homebush area to address the need for a high profile rectangular sports stadium, before finalising stadia investment • Commence planning for an outer Western Sydney stadium, to be built in the longer term • Explore options for a multi-use indoor arena in a strategic Sydney location • Reserve \$600 million from the <i>Rebuilding NSW</i> initiative to support investments in sporting infrastructure during the timeframe covered by this report 	Reservation of \$600 million from the <i>Rebuilding NSW</i> initiative

Snapshot

- NSW has the largest arts and cultural sector in Australia, employing more than 176,000 people, about 5.6 per cent of total NSW employment and 36 per cent of the national arts workforce. Eleven of Australia's 28 Major Performing Arts Companies have a base in NSW.
- NSW leads the country for cultural tourism. In 2013, NSW attracted approximately 9.8 million international and domestic cultural visitors. State cultural institutions attracted 4.8 million paying visitors, who contributed an estimated \$8.3 billion to the NSW economy.
- The Sydney Opera House, Sydney's foremost tourist attraction, attracts over 8.2 million visitors each year.
- Cultural and heritage visitors spend almost twice as much as other international visitors – \$6,280 per trip compared to \$3,832 per trip.
- The major cultural institutions owned by the NSW Government comprise assets worth approximately \$7.4 billion, primarily located in central Sydney, of which \$2.8 billion is invested in property and \$4.6 billion in collections. Average expenditure over the last 10 years across sports and cultural sectors has been \$114 million a year: 55 per cent on sporting venues and 45 per cent on cultural venues.
- In addition to the NSW Government's cultural institutions, other key cultural organisations, such as the Museum of Contemporary Art Australia (MCA), Carriageworks and the Sydney Theatre Company, contribute significantly to the State's cultural economy. In 2013, the MCA attracted just under one million visitors to its base in The Rocks.
- Sydney's cultural institutions support regional NSW by lending and touring collections, off-site presentations, educational programs and online access to resources.
- National parks are a significant asset for regional tourism economies, receiving over 34 million domestic visits each year and generating thousands of regional jobs.
- The NSW Government has more than \$2 billion invested in 40 sporting stadia, ranging from Tier 1 international standard venues to Tier 3 local venues. Approximately \$21 million is spent every year on maintaining these venues.
- In 2013, 1.36 million patrons attended 61 major events at Allianz and the SCG, with an average attendance of 22,320.
- ANZ Stadium at Sydney Olympic Park attracted 1.9 million people to a mix of events, while Sydney Olympic Park overall attracted 2.46 million people to various sporting events.

9.1 Summary

According to the 2012 World Cities Culture Report,¹⁰⁷ cultural experiences and institutions are key drivers in attracting leisure visitors, business travellers and skilled workers to a city.

Sydney has a wealth of cultural attractions to offer visitors and residents – from the globally recognised Sydney Opera House and world-class collections in the city’s art galleries and museums to Australia’s leading music, theatre and dance companies. However, a number of significant cultural assets in the city are in need of renewal, including the Opera House, the Art Gallery of NSW, the Powerhouse Museum (part of the Museum of Applied Arts and Sciences), the Australian Museum and the State Library of NSW. Infrastructure NSW has estimated that at least \$2 billion is required to bring these assets up to national and international standards, an amount far exceeding likely available funds in the future. This means that rigorous demand and options analysis, together with identification of innovative ways to provide capital and ongoing funding, will be needed to renew and expand these important assets.

The NSW Government has commenced revitalising and expanding the city’s cluster of arts and cultural institutions around the CBD and Sydney Harbour, however, greater clarity on the drivers for that investment, and an agreed strategic outcome, is needed.

Infrastructure NSW recommends reserving \$600 million from the *Rebuilding NSW* initiative to improve cultural infrastructure across the State, with a strong focus on developing and investing in clearly defined cultural precincts.

In Sydney, Infrastructure NSW recommends two clearly defined cultural precincts: a CBD precinct (based around the Sydney Opera House, extending to Barangaroo in the west and the Australian Museum in the east) and a Parramatta precinct, established as part of the North Parramatta Urban Renewal project.

To anchor the new Parramatta cultural precinct, Infrastructure NSW recommends giving consideration to relocating the Powerhouse Museum. A relocated Powerhouse could be a core asset in the Parramatta precinct and a major addition to cultural infrastructure in the west. In addition, as part of the recommended whole-of-sector strategy, functions and collections from CBD-based institutions, such as the Australian Museum, could be shared with or at least exhibited in the Parramatta Cultural Precinct.

In Western Sydney, Infrastructure NSW recommends that the NSW Government should develop, in partnership with local councils, opportunities for co-investment in repurposed existing infrastructure and new cultural infrastructure as appropriate, with particular regard to the river cities of Liverpool, Penrith and Campbelltown.

Outside Sydney, cultural investment priorities in Newcastle and Wollongong should be delivered in partnership with local councils, with an initial focus on developing precincts based around the Newcastle Art Gallery and the Wollongong Town Hall and Performing Arts Centre.

In regional NSW, investment should be directed towards the creation of regional cultural hubs and precincts, with further investigation into the potential for digital infrastructure to drive local and tourist visitation.

Infrastructure NSW supports plans for a purpose-built Indigenous Cultural Centre within the CBD Cultural Precinct to facilitate greater access to Australian indigenous art and culture in general and to established indigenous collections located in Sydney and regional NSW.

There are a number of opportunities to grow the contribution which national parks make to the State’s economic and social wellbeing through transformative capital investment, as has taken place in New Zealand, Victoria and Tasmania.

Infrastructure NSW recommends reserving \$300 million from the regional allocation of the *Rebuilding NSW* initiative to create an Environment and Tourism Fund to develop environmental assets in national parks and support tourism in regional NSW.

107. Greater London Authority 2012, World Cities Culture Report

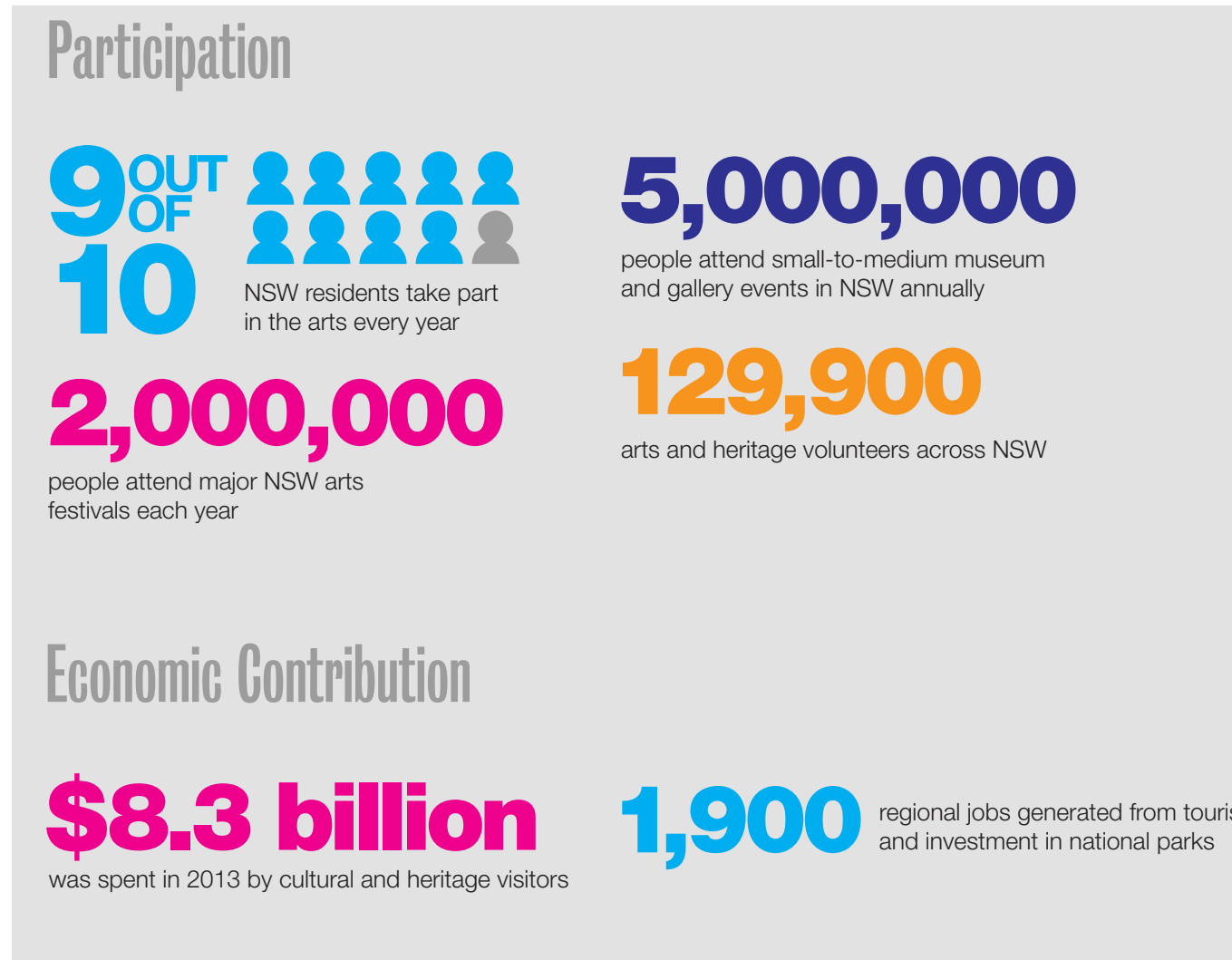
Infrastructure NSW also recommends that investment in sporting infrastructure focus on implementing the NSW Government's Stadia Strategy, which consolidates and directs investment into a limited number of world-class stadia and aims to create two international sporting hubs at Moore Park and the Olympic Park/Parramatta precinct.

Upgrades to the Moore Park sporting precinct – home to Rugby League Central, the Australian Cricket Team, NSW Blues, Sydney Sixers, Sydney Swans, Sydney Roosters, NSW Waratahs and the Sydney FC – should be completed. Infrastructure NSW also suggests that the Government carry out a full review of major stadia alternatives in the Parramatta/mid-western suburbs to identify the best means of providing a high quality rectangular sports stadium in the region, before finalising stadium investment plans.

Infrastructure NSW recommends that the Government commence long-term planning for building an outer Western Sydney stadium and examine options for a multi-use indoor arena in a strategic Sydney location to accommodate sports such as basketball, badminton, table tennis, tennis and martial arts.

Making these investments will ensure that Sydney and NSW continue to offer a diverse and expanding range of arts, cultural and sporting facilities that will help to attract visitors, new residents and investors to NSW.

Figure 9.1 Cultural and Sporting Overview



NSW is home to:

40%

of Australia's creative industries workforce

11

of Australia's 28 major performing arts companies



Australia's leading music companies: the Australian Brandenburg Orchestra, the Australian Chamber Orchestra, Musica Viva Australia, Opera Australia, the Sydney Symphony Orchestra



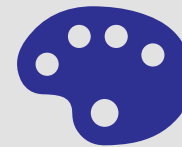
Australia's leading theatre and dance companies: Bangarra Dance Theatre, Belvoir St Theatre, Bell Shakespeare, Sydney Dance Company, Sydney Theatre Company

Visitation



Sydney Opera House

8.2 million visitors. 1.4 million attend 1,700 performances



Art Gallery of NSW

1.1 million visitors including Brett Whitely Studio and 6 touring exhibitions



State Library of NSW

5 million on-line visits



Australian Museum

10.6 million visits to the website



Museum of Applied Arts and Sciences (Powerhouse)

0.5 million visitors



Allianz Stadium and SCG

1.36 million visitors Moore Park is home to Rugby League Central, the Australian Cricket Team, NSW Blues, Sydney Swans, Sydney Sixers, Sydney Roosters, NSW Waratahs and the Sydney FC



Sydney Olympic Park

2.46 million visitors



ANZ Stadium

1.9 million visitors

9.2 Progress since 2012

9.2.1 Cultural infrastructure

The Government's priorities for cultural infrastructure, set out in the 2012 State Infrastructure Strategy were to revitalise and expand the State's existing cluster of world-class institutions and attractions through the development of an 'Arts and Cultural Ribbon' around Sydney Harbour and the CBD.

Key projects were identified as:

- Completion of the Walsh Bay Arts Precinct, (subject to a business case and available funding) within 10 years
- Investigation of options to expand the Art Gallery of NSW, renew the Sydney Opera House and expand the State Library of NSW, the Australian Museum and the Museum of Applied Arts and Sciences, all within 10 years.

Work is now under way to implement these priorities:

- The \$153 million Sydney Opera House Vehicle Access and Pedestrian Safety Project is nearing completion and \$13.7 million has been provided to develop the Sydney Opera House renewal framework, which will set out the vision, priorities and service needs for this iconic building over a 10 year timeframe.
- \$10.8 million has been provided to the Art Gallery of NSW for Stage 1 of the Sydney Modern master plan, which will double the size of the Gallery and increase gallery visitations from 1.2 million to 2 million a year.

- \$4.7 million has been provided to the Australian Museum to develop a master plan to better use the Museum site, particularly the eastern end of the College Street site.
- The State Library has received \$8 million for master planning and \$48.6 million for ongoing work to digitise its collections.
- A final business case has been completed for the Walsh Bay Arts Precinct to upgrade the existing facilities at Wharf 4/5 used by Sydney Theatre Company, Bangarra Dance Theatre, the Sydney Dance Company and the Sydney choirs, and to create new facilities on Pier 2/3 for the Australian Chamber Orchestra, the Australian Theatre for Young People and Bell Shakespeare Company
- The construction of a \$33 million storage facility at Castle Hill to enable the State-owned cultural institutions to share storage is also nearing completion.

9.2.2 Sporting infrastructure

Since 2012, the strategic priority for investment in sporting infrastructure has been in accordance with the Government's Stadia Strategy. Specific projects that have now been completed or are under way include:

- The Stage 2 redevelopment (\$197.5 million) of the Sydney Cricket Ground, with upgrades to the M.A. Noble, Don Bradman and Dally Messenger Stands
- Precinct improvements at Sydney Olympic Park, including construction of an AFL training and administration facility and Netball Central

- Better public transport and pedestrian access to the Moore Park precinct
- Improvements to the Hunter Stadium.

9.3 Ongoing challenges

9.3.1 Ad hoc planning, capacity constraints and ageing assets

Historically, cultural and sporting infrastructure investment in NSW has suffered from the lack of an agreed strategic economic and planning framework, including limited demand analysis. This has resulted in a lack of 'whole of government' planning.

The capital allocation process has meant that only NSW Government-initiated developments have access to capital development funds. Support for projects at the local government level, or for other non-government facilities, has been provided as grant funding, largely without detailed and robust business cases.

The challenge is to plan for better investment and make decisions based on an evidence-based needs assessment, forecasts of demand, analysis of potential revenue streams and an appraisal of net economic benefits and wider social goals. There is no reason why investments in cultural and sporting infrastructure, including investment in environmental infrastructure in national parks, should not demonstrate value for money, exploration of alternative funding sources and consideration of alternatives to major capital works.

Drivers for investment in key locations include:

- In central Sydney – the visitor economy and the role that cultural and sporting infrastructure can play in enhancing Sydney’s attractiveness as a place to work and invest
- In Western Sydney – changing demographics and a growing population west of Homebush, where investment continues to lag behind population growth
- In regional NSW – a segmented market, based on community demand, and the unique cultural and visitor profiles of key locations.

Recommendation

Infrastructure NSW recommends that all future investment decisions, including those foreshadowed in this report, be reviewed in accordance with a standardised investment framework.

9.3.2 Cultural infrastructure

Options to renew Sydney’s cultural infrastructure

A number of significant cultural assets in Sydney are in need of renewal, with capacity constraints and ageing assets reducing their competitiveness relative to other States.

The Sydney Opera House faces significant challenges, including ageing stage machinery, access, acoustics, capacity and technical support, while the Art Gallery of NSW is half the size of the major galleries in Melbourne and Brisbane.

The Australian Museum has 18 million objects, including the world’s best Australian indigenous and Pacific Islander collections, yet has only one fifth of the display space of the Melbourne Museum, resulting in these important collections being kept largely in storage.

The State Library of NSW, the home of some of the most important historical documents and artefacts in NSW and Australia, has inadequate and unsatisfactory storage and exhibition space. The Powerhouse Museum is site-constrained and located remotely from other key cultural institutions.

Infrastructure NSW has estimated that at least \$2 billion is required to bring these assets up to nationally and internationally competitive standards, an amount far exceeding the funds likely to be available in the future.

Rigorous demand and options analysis, together with identification of innovative ways to provide capital and ongoing funding, is therefore required to support investment proposals. To this end, Infrastructure NSW, in collaboration with NSW Treasury and NSW Trade & Investment (Arts NSW), is preparing a cultural infrastructure investment framework designed to improve the economic assessment of cultural infrastructure projects and identify alternative ways of funding and financing them.

The final report is due in early 2015.

Investing in cultural precincts and hubs across the State

Precincts form because they enable collaboration and promote higher rates of visitation. Close proximity lowers the cost of providing services and increases productivity and the exchange of ideas. These benefits are known as the ‘economies of agglomeration’.¹⁰⁸ Agglomeration benefits accrue at the local level, as well as the city level, and vary by industry. They are highest in the financial services, professional services and cultural and scientific sectors.¹⁰⁹

In the 2012 State Infrastructure Strategy, the Government recommended revitalising and expanding the State’s existing cluster of cultural institutions and attractions through the development of an ‘Arts and Cultural Ribbon’. Infrastructure NSW considers that the establishment of more defined cultural precincts along the Ribbon would enhance potential agglomeration benefits for these assets.

Infrastructure NSW considers that the primary focus for cultural investment should be the Sydney CBD, as the visitor economy is primarily focused on the city centre; it is highly accessible for residents and visitors, and existing facilities, especially around the Sydney Opera House, already form a loose precinct.

¹⁰⁸. Glaesser, E 2011, *The Triumph of the City*

¹⁰⁹. SGS Economics & Planning 2011, *Agglomeration and Labour Productivity in Australian Cities*

A **Sydney CBD Cultural Precinct** should be established and clearly defined by:

- Location
- Distance (no more than 1.5 km walking distance between cultural venues)
- Institutional offering (creating the best institutional mix within the precinct).

Based on these criteria, a cluster around the Sydney Opera House, the Museum of Contemporary Art Australia, Walsh Bay Arts precinct, the State Library of NSW, the Art Gallery of NSW and the Australian Museum is logical. Proposed cultural facilities at Barangaroo would also be accessible to this cluster, although the Powerhouse Museum is not.

Priority co-investment in this precinct should be given to:

- Progressive implementation of the Sydney Opera House renewal framework (asset renewal and lyric theatre), subject to the completion of a business case
- Walsh Bay Arts precinct (ready to proceed now)
- Art Gallery of NSW: Sydney Modern, subject to a business case
- State Library of NSW, subject to a business case
- Indigenous Cultural Centre, subject to a business case and the Barangaroo Development Authority's mandate to be 'self-funding'.

Figure 9.2 Sydney CBD Cultural Precinct



Source: Infrastructure NSW

Renewing the Sydney Opera House is expected to cost around \$600 million over 10 years (including \$150 million in the first three years). Infrastructure NSW notes that the Opera House is a significant national cultural asset and, as such, a funding contribution from the Commonwealth Government towards its renewal is appropriate.

Infrastructure NSW also considers that a purpose-built Indigenous Cultural Centre should be a component of this cultural precinct, as indigenous art and culture is a major attraction for visitors to Sydney and integral to Australia's cultural identity. This Centre will facilitate greater access to Australian indigenous art and culture in general and to established indigenous collections located in Sydney and regional NSW. The site nominated for the Centre at Barangaroo Head Land Park is supported as it meets the criteria listed above.

Greater collaboration between institutions housing indigenous collections is also recommended to create a precinct-wide visitor experience and to enable sharing and consolidation of collections as appropriate. In particular, the Indigenous and Pacific Island Collection housed in the Australian Museum should be more accessible to the general public.

The Australian Museum occupies a large CBD site that is currently under-utilised and poorly configured. Located at the eastern end of the proposed CBD cultural precinct, the Museum and site have considerable potential for reconfiguration. Infrastructure NSW notes the ongoing development of plans to upgrade the Museum and redevelop the site, with the potential for the Museum upgrade to be eventually self-funding.

Infrastructure NSW considers that redevelopment plans and further public investment in the Australian Museum should be subject to alignment with a whole-of-sector cultural infrastructure strategy. In particular, specific asset renewal plans should be subject to a full options analysis, including an assessment of the appropriateness of the asset as currently configured to meet long-term functional objectives.

NSW Cultural Institutions have remarkable collections. As part of a whole-of-sector strategy, the Government should find new and innovative ways of putting more of these collections on display. Opportunities to share and exhibit complementary collections between all institutions should be encouraged.

As noted above, the Powerhouse Museum is relatively remote from the proposed CBD cultural precinct. It occupies a constrained (but very valuable) site adjacent to Darling Harbour and will require significant reconfiguration to remain at its current location and comply with the exhibition and security standards of international and national lending institutions.

Given the growing deficit of cultural infrastructure in Sydney's western suburbs, there is a strong case for relocating the Museum to a new cultural precinct serving the west. The Museum's educational orientation makes it a good fit for the growing population of the area and its relocation could be partly funded by realising the commercial value of its existing site. The Museum would be a core asset – and potentially an iconic and popular one – in a cultural precinct in Sydney's west (see overleaf).

Recommendation

Infrastructure NSW recommends the establishment of a clearly defined Sydney CBD cultural precinct, with staged investment in the Sydney Opera House, the Walsh Bay Arts precinct, the Art Gallery of NSW and the State Library of NSW.

Recommendation

Infrastructure NSW considers that redevelopment plans and further public investment in the Australian Museum should be subject to alignment with a whole-of-sector cultural infrastructure strategy. In particular, an assessment is needed of whether the current site's configuration is appropriate to meet long-term functional objectives, alongside full options analysis of opportunities for site optimisation and reconfiguration.

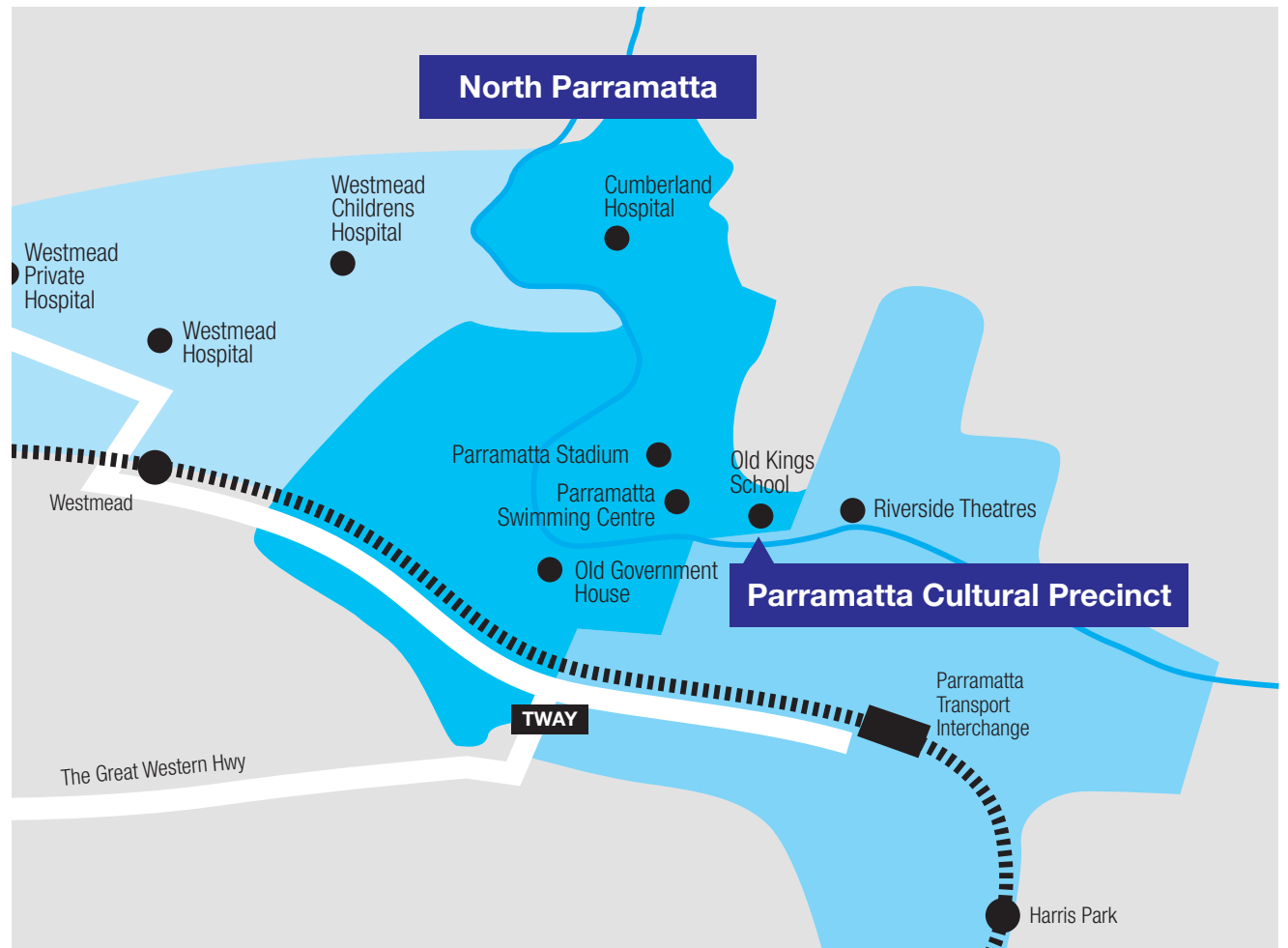
Recommendation

Infrastructure NSW supports plans for a purpose built Indigenous Cultural Centre within the Sydney CBD Cultural Precinct. The site nominated at Barangaroo Head Land Park is supported.

Recommendation

Infrastructure NSW recommends greater collaboration between institutions housing indigenous collections to maximise access to these collections, create a precinct-wide visitor experience and enable sharing and consolidation of collections as appropriate.

Figure 9.3 Parramatta Cultural Precinct



Source: Infrastructure NSW

A **Parramatta Cultural Precinct** should be established and clearly defined investment in this precinct based on the same principles as the Sydney CBD Cultural Precinct.

Within 25 years, Western Sydney will be home to more than half of Sydneysiders. Greater Parramatta will continue to grow in significance to Sydney and has the potential to reach 100,000 jobs over the next 20 years. The new University of Western Sydney campus, located just to the east of the Parramatta CBD, is forecast to cater to over 10,000 students by 2017. The 2011 Census revealed that Greater Parramatta is diversifying, experiencing growth in knowledge-based industries and attracting more highly qualified people to work in Parramatta. Employees with a bachelor or higher degree increased by almost 26 per cent between the 2006 census and the 2011 census.¹¹⁰ In 2012, Sydney Festival activities scheduled in Parramatta returned benefits of \$1.1 million to the City of Parramatta.¹¹¹

As part of the Government's plan to focus on Greater Parramatta as a centre of metropolitan significance, UrbanGrowth NSW has been directed to transform and revitalise the Parramatta North precinct to create a mixed-use urban renewal precinct.

This precinct is home to some of Australia's most important heritage buildings and is situated on the banks of the Parramatta River – within five minutes of the Parramatta CBD and close to existing major transport links. UrbanGrowth NSW will deliver around 6,000 new homes and 2,000 new jobs into the precinct as part of

this revitalisation. Existing heritage and parkland space will also be upgraded.

There are also plans to expand and improve the specialised health and education precincts at Westmead and Rydalmere, located to the north and east of the Parramatta North precinct.

These developments suggest that there are significant opportunities to expand cultural infrastructure in the region. Infrastructure NSW considers that as part of the Parramatta North Urban Renewal project, there is an opportunity to develop a Parramatta Cultural Precinct based around the Riverside Theatre complex, the old David Jones site, Parramatta Stadium and the Old King's School site.

Recommendation

Infrastructure NSW recommends that a Parramatta cultural precinct be developed as part of the Parramatta North Urban Renewal project based around the Riverside Theatre Complex, the old David Jones site, Parramatta Stadium and the old Kings School site.

Recommendation

Infrastructure NSW recommends that, before any further public investment is made in the Powerhouse Museum, urgent consideration be given to its potential relocation to the Parramatta Cultural Precinct.

Recommendation

As part of the recommended whole-of-sector cultural infrastructure strategy, opportunities to share and exhibit complementary collections between all institutions should be encouraged. Functions and collections from CBD-based institutions (such as the Australian Museum) could be shared with – or at least exhibited in – the Parramatta Cultural Precinct.

110. Department of Planning & Environment 2014, Draft: A Plan for Growing Sydney – The Metropolitan Strategy

111. Deloitte Access Economics 2012, Sydney Festival – Executive Summary

The potential for **Western Sydney cultural hubs** should also be explored. New pathways need to be established for local government to propose co-investment with the NSW Government for the development of these cultural hubs, with particular regard to the river cities of Liverpool, Penrith and Campbelltown.

Infrastructure NSW notes the preliminary work being undertaken by NSW Trade & Investment (Arts NSW) in conjunction with the Western Sydney Arts & Cultural Lobby to research cultural investment development needs.

Recommendation

Infrastructure NSW recommends that Arts NSW takes the lead to develop, in partnership with local councils, opportunities for co-investment in new cultural infrastructure and repurposed existing infrastructure, to meet the demands of the growing population in Western Sydney – starting with the river cities of Liverpool, Penrith and Campbelltown.

Newcastle and Wollongong

Cultural investment priorities in Newcastle and Wollongong should be delivered in partnership with the City of Newcastle and the City of Wollongong.

Opportunities exist to enhance the cultural precinct in Wollongong based around the Town Hall and the Performing Arts Centre. In Newcastle, consideration will need to be given to local priorities, but the focus should be on investment in the city's cultural precinct based around the Art Gallery.

Recommendation

Infrastructure NSW recommends cultural investment priorities in Newcastle and Wollongong be delivered in partnership with the City of Newcastle and the City of Wollongong.

In Newcastle, investment should focus on the cultural precinct which will develop around the city's Art Gallery.

In Wollongong, plans should focus on enhancing the cultural precinct around the Town Hall and Performing Arts.

Regional NSW

The NSW Government has established an Economic Development Strategy for Regional NSW which highlights the economic importance of overseas, interstate and domestic visitors to regional NSW. The strategy notes the role arts and culture investment can play in providing a platform for visitors to experience the attractions of NSW, while also helping to rebuild regional economies.

Infrastructure NSW recommends that investment in regional cultural infrastructure should be directed to the creation of creative hubs and cultural precincts, with appropriately scaled local infrastructure in smaller regional areas, as envisaged by Arts NSW. Community access to arts and cultural facilities can be achieved through greater investment in the use of digital infrastructure and innovative uses of existing community infrastructure.

Recommendation

Infrastructure NSW recommends the creation of regional creative hubs and cultural precincts with further investigation of the potential for digital infrastructure to drive local and tourist visitation and innovative uses of existing community infrastructure.

A whole-of-sector cultural infrastructure strategy

NSW Trade & Investment (Arts NSW) has recently developed a Cultural Infrastructure Strategy (CIS) in response to the renewal and demand challenges described above. The CIS outlines strategic policy directions for NSW Government cultural infrastructure over the next 10 years, focused on the three directions set out below.

Direction One	Expand, in partnership with local government, the arts and cultural facilities available to the people of Western Sydney. We will work on the Parramatta North Urban renewal project and plan for the optimal mix of community, cultural and commercial uses.
Direction Two	Investigate, in partnership with local government, opportunities for strengthening cultural facilities in regional NSW
Direction Three	Ensure NSW, through Sydney, is a cultural leader in the Asia Pacific. Sydney investment will focus on renewing the State Cultural Institutions along Sydney's Cultural Ribbon. We will seek to maximise arts and cultural opportunities in major urban developments

The CIS is principally a plan for NSW Government-owned and-managed cultural assets, which include Sydney's major cultural institutions and the properties administered by Arts NSW as part of the Arts Portfolio. It also seeks, through the directions set out above, to address the need for a cultural infrastructure strategy for the sector as a whole.

Infrastructure NSW and NSW Department of Trade & Investment will work together to develop a whole-of-sector cultural infrastructure strategy and will engage with all key cultural institutions including the Museum of Contemporary Art Australia (MCA), Carriageworks and the Sydney Theatre Company as well as the cultural initiatives at Barangaroo.

Development of this whole-of-sector strategy would incorporate initiatives from the public and private sectors, with input from local government (which has primary responsibility for cultural infrastructure in Western Sydney and regional NSW, statutory authorities (such as the Barangaroo Development Authority, the Sydney Harbour Foreshore Authority and UrbanGrowth NSW), as well as other key cultural organisations.

An example of a small but effective initiative reflecting a CBD whole-of-sector approach would be the development of an integrated 'highlights walk' and mobile app linking cultural facilities starting at the Sydney Observatory and progressing through Barangaroo, Walsh Bay, the Rocks, the Sydney Opera House, the Royal Botanic Gardens, Sydney Living Museum properties, the State Library and Macquarie Street, the Art Gallery of NSW and the Australian Museum.

\$ Recommendation

Infrastructure NSW recommends a reservation of \$600 million from the *Rebuilding NSW* initiative for the Cultural Infrastructure Program.

Recommendation

Infrastructure NSW and NSW Department of Trade & Investment will work together, to develop and implement a whole-of-sector cultural infrastructure strategy to make best use of public funds and existing infrastructure and sites.

9.3.3 Regional environmental and tourism infrastructure

One of the greatest assets of regional NSW is its natural beauty. Other jurisdictions, notably Victoria and Tasmania, have boosted their visitor economies through targeted investments that combine environmental protection – for instance, in national parks – with infrastructure that supports overseas, interstate and domestic visitation.

National parks are key assets for Sydney and regional NSW, contributing to quality of life in cities and towns, and anchoring the State's attractiveness as a destination for domestic and international visitors. The national parks system is an essential component of NSW's tourism and recreational infrastructure and a significant repository for some of the State's highest value natural capital. Across NSW, national parks receive over 34 million domestic visits each year.

National parks and reserves also play a critical role in local tourism economies and provide opportunities for regional and Aboriginal owned businesses across NSW. In the North East region, tourism and public investment in national parks generate more than 1900 regional jobs, and over \$120 million in regional value-added activity.¹¹²

There are a number of opportunities to grow the contribution national parks make to the State's regional economies through transformative capital investments, as has taken place in Victoria, Tasmania and New Zealand. Examples might include the provision of eco-tourism infrastructure such as walking tracks, re-purposed heritage buildings, and purpose designed visitor facilities.

Infrastructure NSW will work with the Office of Environment and Heritage to prioritise such investment and will assist in the development of business cases for environmental investment in under-utilised national park assets to support overseas, interstate and domestic visitation.

Recommendation

Infrastructure NSW recommends a reservation of \$300 million from the *Rebuilding NSW* initiative for the Regional Environment and Tourism Program to invest in improved national park and regional tourism infrastructure

9.3.4 Sporting infrastructure

Implementation of the Stadia Strategy

The 2012 Stadia Strategy is designed to deliver significant benefits to the NSW Government, sporting bodies and franchises, and the wider NSW community and economy by consolidating and directing investment into a limited number of stadia to deliver a world class stadia network.

The strategy was developed following significant research to develop a NSW Stadia Register and hierarchy of stadia in NSW, and was informed by extensive stakeholder consultation, scenario modelling and benchmarking with other Australian States.

The strategy prioritises increased utilisation for its most capital intensive assets and seeks to develop improved economies in stadia operations. It recommends the creation of two principal sporting hubs and the development of wider entertainment precincts leading to better game-day experiences for spectators.

However, notwithstanding the adoption by the NSW Government of the Stadia Strategy and the efforts of the former Office of Communities and the various sporting codes, real investment to implement the strategy has been slow to materialise.

112. DECCW. 2009, *Economic Benefits of National Parks and Other Reserves in NSW: Summary Report*.

Consolidate and invest

Stadia across NSW have been classified into tiers.

Table 9.1 Stadia classifications

Tier 1	<i>All located in Greater Sydney:</i> Stadium Australia (ANZ Stadium) Sydney Football Stadium Sydney Cricket Ground	Seating capacity greater than 40,000; regularly host international sporting events; offer extensive corporate facilities, including corporate suites, open-air corporate boxes, and other function/ dining facilities; maybe the home ground for sporting teams playing in national competitions
Tier 2	<i>In Greater Sydney:</i> Brookvale Oval Campbelltown Sports Stadium Endeavour Field, Woollooware Jubilee Oval, Kogarah Leichhardt Oval Penrith Stadium Parramatta Stadium Sydney Showground Stadium <i>In regional NSW:</i> Central Coast Stadium (Gosford) Hunter Stadium (Newcastle) Wollongong Stadium	Total seating capacity of between 20,000 and 40,000; some corporate facilities; home grounds for sporting teams playing in national competitions.

Source: KPMG 2012, Development of a NSW Stadia Strategy – Final Report

Unlike cultural infrastructure in Western Sydney, there is an oversupply of sporting infrastructure capacity, with competition between sporting venues in Sydney resulting in a ‘buyer’s market’.

Many Tier 2 stadia operate at less than capacity and do not have a year-round program of national events. On the other hand, each of Greater Sydney’s Tier 1 Stadia, while not underutilised to the same extent, requires substantial investment not only in the stadium itself, but also in the surrounding food, entertainment and transport hubs to bring the stadium offering up to the standard of comparable venues interstate, particularly in Melbourne.

The Stadia Strategy is to ‘consolidate and invest’, with a focus on:

- Creating international sporting hubs at Moore Park and Sydney Olympic Park, as well as in the large population centres of Wollongong, Newcastle and Western Sydney
- Planning a 30,000 seat stadium in outer Western Sydney to accommodate future events and to reflect the rapid population growth in this area
- The conversion of other Tier 2 stadia to meet community needs, such as elite training facilities, playing fields for junior games and pre-season matches. Belmore Sports Ground and Redfern Oval provide examples of how venues can be redeveloped to maintain strong links between elite sport and the local community.¹¹³

113. KPMG 2012, Development of a NSW Stadia Strategy – Final Report

Figure 9.4 NSW Stadia Strategy: ‘Consolidate and Invest’



Source: KPMG

Principles for further investment

Infrastructure NSW considers that the following principles should guide further investment in sporting infrastructure.

- Maximise the benefits of consolidation

The Stadia Strategy recommended as a priority the creation of two sporting hubs: Moore Park and Sydney Olympic Park. The upgrade of the Moore Park precinct is critical, given ageing assets and the location of two Tier 1 Facilities in the precinct (the Sydney Football Stadium, which is the premier rectangular stadium in Sydney, and the Sydney Cricket Ground, which currently hosts the majority of international cricket matches), a combined seating capacity of approximately 100,000 and the precinct’s location next to the leisure and retail facilities of the Entertainment Quarter.

The Moore Park facilities are home to Rugby League Central, the Australian Cricket Team, NSW Blues, Sydney Sixers, Sydney Swans, Sydney Roosters, NSW Waratahs and the Sydney FC and, once the Sydney Light Rail is completed, will be well connected to the CBD.

Infrastructure NSW considers that further investment is needed in the Moore Park precinct, in both the Sydney Football Stadium and the Sydney Cricket Ground, to bring the stadia experience up to comparable interstate venues. The proposed upgrades to the Sydney Cricket Ground stadium should be completed to maximise the benefits of this sporting hub.

Recommendation

Infrastructure NSW recommends the completion of upgrades to the Moore Park sporting precinct focusing on the Sydney Football Stadium.

- Optimisation of the Sydney Olympic Park precinct and Parramatta Stadium

Parramatta Stadium will reach the end of its useful economic life in 2025-26, while ownership of Stadium Australia (ANZ Stadium) will return to the NSW Government in 2031. Both stadia are in need of significant upgrades to improve their amenity and to develop the surrounding retail, commercial and entertainment precincts. Stakeholders have indicated that ANZ Stadium in particular suffers from not being a purpose-built rectangular stadium and provides less than optimal conditions for its principal user, the NRL.

Current suggestions for upgrading Stadium Australia include a retractable roof to provide weatherproofing and the construction of retractable seats at each end of the ground to bring fans closer to the field. Parramatta Stadium will also need substantial re-configuration if it is to be useable after 2025-26.

Recommendation

Infrastructure NSW recommends that a full review of major stadia alternatives in the Parramatta/Homebush area is carried out to address the need for a high profile rectangular sports stadium in these suburbs, before finalising stadia investment plans.

- Outer Western Sydney Stadium

The Stadia Strategy commits the NSW Government to providing a 30,000 seat stadium in outer Western Sydney to accommodate future demand. Infrastructure NSW recommends the commencement of long-term planning for an outer Western Sydney stadium, to be built in the longer term.

Recommendation

Infrastructure NSW recommends the commencement of long-term planning for an outer Western Sydney stadium, to be built in the longer term.

- Indoor arena

NSW is well placed to be a regional leader in some of the sports gaining popularity in Asia, where rapid economic growth is driving new markets for sport, leisure and sports related tourism. As many of these sports, including basketball, tennis, badminton and martial arts, use indoor facilities, an indoor arena in Sydney is likely to enjoy good patronage and deliver significant benefits.

Recommendation

Infrastructure NSW recommends that options be explored for a multi-use indoor arena in a strategic Sydney location.

Further investment

As noted at the beginning of this section, the 2012 Stadia Strategy released by the NSW Government remains a sound basis for planning the State's high level sporting infrastructure. While more work needs to be done to support the detailed investment program flowing from the Strategy – not least in relation to future stadia investments in Sydney Olympic Park and/or Parramatta and the potential indoor arena – it would be prudent to reserve an appropriate level of funding from the *Rebuilding NSW* initiative to ensure that investment decisions can proceed quickly to implementation once they have been taken.

Recommendation

Infrastructure NSW recommends a reservation of \$600 million from the *Rebuilding NSW* initiative for the Sports Stadia Infrastructure Program covered by this Report.

