Key Issues Report

Uralla Shire Council

Uralla Housing Strategy 2025-2035

REMPLAN

Uralla Housing Strategy

Key Issues Report

This report has been prepared by the team at REMPLAN

November 2024

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1 Executive Summary

Uralla Shire is facing mounting pressures from Australia's housing crisis and the transformative impacts of Renewable Energy Zones (REZs), which are driving unprecedented housing demand and requiring diverse, accessible options for an evolving population. To address these challenges, Uralla Shire Council has commenced a process to develop a Local Housing Strategy, guiding housing delivery over the next 10 to 20 years.

The strategy integrates existing frameworks, housing audits, and economic and environmental analysis while engaging stakeholders to identify barriers and opportunities. This process is supported by a Key Issues Report, which assesses policy, community priorities, the housing market, and the impact of the New England REZ, providing evidence-based recommendations to shape strategic land-use policies and meet the Shire's future housing needs.

Key Challenges and Opportunities

Housing Market Pressures

Rising housing costs, driven by a combination of broader macro-economic factors and demand from renewable energy projects, have displaced residents and reduced affordability.

The dominance of large family homes contrasts with growing demand for smaller, low-maintenance housing suitable for an ageing population and lower-income households.

Rental affordability has declined, particularly during peak construction periods for renewable energy projects.

Population and Workforce Dynamics

Uralla's ageing population requires diverse housing options, including retirement housing, independent living units, and aged care facilities.

Renewable Energy Zone (REZ) projects will bring temporary workforce surges, increasing housing demand and stressing local resources. Effective management is essential to avoid long-term social and economic disruptions.

Infrastructure and Land Supply

Despite adequate zoned land for long-term growth, constraints such as bushfire risks, limited stormwater capacity, and infrastructure gaps restrict development.

There is significant reliance on underutilised properties and small-scale subdivisions to meet future housing demand.

Economic Growth and Community Balance

Community sentiment underscores the need for balancing economic growth with preserving Uralla's character and ensuring inclusive housing strategies.

The economic benefits of renewable energy projects can be leveraged to fund infrastructure and housing initiatives.

Summary of Findings

Uralla has sufficient zoned land to meet demand over 20 years, but development depends on activating underutilised and vacant properties. The local housing and land delivery is characterised by small-scale development, typically undertaken by local landowners. Strategic support for small developers is needed to streamline processes and enhance housing delivery. New initiatives and mechanisms will be required to help unlock existing residential land for development, including arrangements to more equitably distribute infrastructure costs.

Table 1 Growth scenario demand versus supply

Area	Av. annual dwelling demand	Years of supply (Vacant and approved only)	Years of supply (All residential zoned land)
Uralla Township	7	20+	20+
Invergowrie-Saumarez Ponds	4	9	20+
Uralla Balance	3	20+	20+
Uralla LGA	14	20+	20+

Rising demand from renewable energy projects presents a dual challenge: accommodating temporary workers sustainably while leveraging these projects to create lasting infrastructure and housing benefits. There is also a significant opportunity. The significant pipeline of projects has the potential to attract new working-age residents and families to the region. The renewable energy sector also has the potential to complement the traditional economic base of agriculture, which can influence population movements in times of environmental strain.

Demographic shifts, including an ageing population and shrinking household sizes, necessitate a transition to smaller, accessible housing. These are trends that are occurring across many regions of Australia but is pronounced in Uralla. The current mismatch of large homes occupied by smaller households results in underutilised stock and higher maintenance costs. Market dynamics and renewable energy-driven growth create opportunities to deliver more diverse housing solutions.

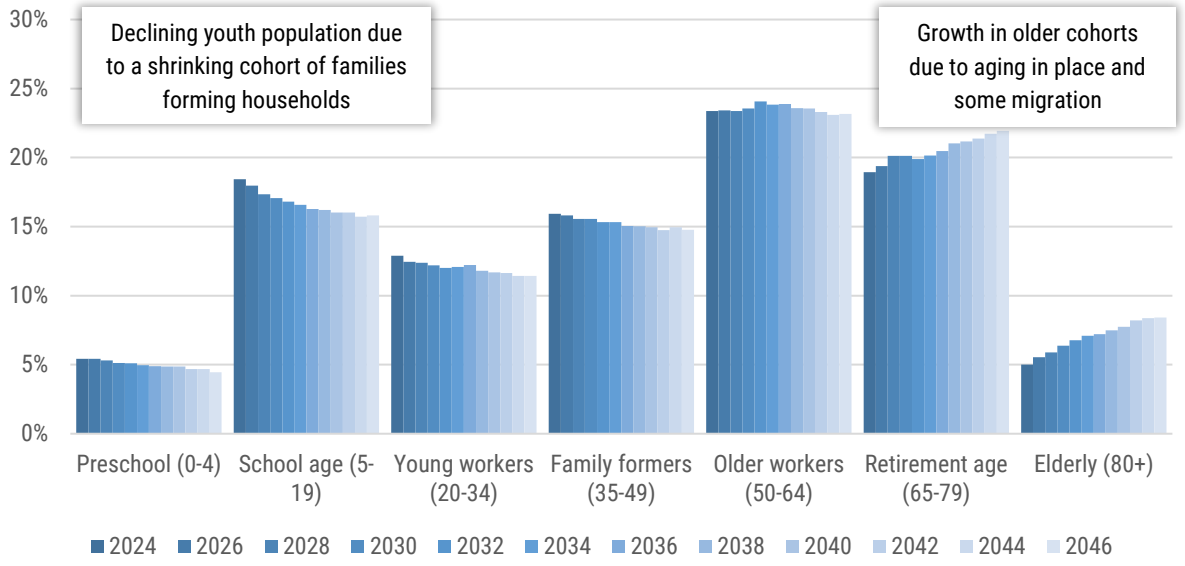


Figure 1 Uralla Shire forecast population age profile (Source: REMPLAN Forecast)

Emerging directions

This Key Issues Report represents the second stage in the preparation of the Local Housing Strategy. The analysis in this paper forms the basis for some emerging directions. These directions are not the final strategy but will inform the development of the Vision, Priorities, and Actions in the final strategy document. The emerging directions from this phase of the project are outlined below.

Policy and planning alignment

- Conduct a comprehensive policy review to address local challenges and infrastructure gaps.
- Recognise and respond to housing affordability pressures through targeted policy frameworks.
- Align local planning instruments with demographic needs.

Targeted Housing Development

- Support the development of dedicated retirement housing, addressing a critical market gap
- Support Community Housing Providers (CHPs) to create smaller 1-2 bedroom dwellings
- Enable Aboriginal Housing Providers to develop diverse housing options that respect cultural needs

Enhancing Existing Neighbourhoods

- Maintain a compact, walkable township by limiting additional land releases
- Focus on infill development and efficient land use
- Preserve the town's character and infrastructure efficiency

Innovative Housing Solutions

- Investigate alternative tenure models like Community Land Trusts
- Provide affordable, community-governed housing options
- Provide support around new housing innovations

Benefitting from Workforce Accommodation

- Develop strategies for temporary and seasonal workers related to renewable energy projects
- Explore centralised worker accommodation facilities
- Create pathways for long-term housing for multi-year workers
- Support initiatives that make better utilisation of existing housing stock

2 Introduction

2.1 Project Summary

Australia is currently in the midst of a housing crisis, with demand outstripping supply and affordability and accessibility decreasing across much of the nation. Regional areas such as Uralla are also experiencing these issues that have typically been confined to the major cities.

Australia's energy landscape is undergoing a significant transformation as the nation works to decarbonise its electricity grid. Coal, once the backbone of power generation, is being rapidly replaced by wind, solar, and storage solutions. The scale of the transition is considerable, and the transformation is advancing at a remarkable pace, driven by declining renewable energy costs, government policies, and the pressing need to meet global climate commitments. Renewable Energy Zones (REZs) are playing a central role in this shift, accelerating large-scale clean energy projects and reshaping the country's energy future.

Uralla Shire is facing the combined pressures of Australia's housing crisis and the transformative impact of the REZ developments, which are driving unprecedented demand for housing. At the same time, the region's population is evolving and requires diverse and accessible housing options. There is a clear need for a comprehensive response to address these challenges and seize the opportunities that these significant forces present for the future of the Shire.

In New South Wales, and Uralla Shire, land use and development is primarily guided by planning instruments such as the *Environmental Planning and Assessment Act 1979*, State Environmental Planning Policies (SEPPs), and Local Environmental Plans (LEPs). These instruments establish legal controls on land use and zoning. State, regional and local strategies, such as the Local Strategic Planning Statements (LSPSs), set the long-term vision and priorities for growth, informing the preparation of LEPs and ensuring local needs align with broader state and regional objectives.

While there are State and regional strategies to specifically guide residential development, Uralla Shire does not currently have a local housing strategy that outlines Council's vision for housing and ties the local vision in with broader strategies.

Uralla Shire Council have engaged REMPLAN to prepare the Uralla Local Housing Strategy (the Strategy). The purpose of the Strategy is to guide the timing, location and type of housing that is delivered to support the changing housing needs of the local community over the next 20 years. The Strategy will do this through:

- Consolidating current planning and housing frameworks.
- Auditing existing housing and land stock.
- Examining economic and environmental factors influencing housing needs.
- Engaging with the local community, adjacent councils, and industry stakeholders.
- Identifying barriers to meeting future housing needs.
- Providing recommendations to inform strategic land-use policy and facilitate new residential development.

The Strategy will be developed over several stages, illustrated in Figure 2 below.

This Key Issues Report (the Report) provides the detailed assessments including policy and strategy review, stakeholder engagement, and technical data analysis. The findings are intended to provide a rigorous underpinning for the development of the final Uralla Local Housing Strategy.

Specifically, the Report includes analysis of:

- The policy and strategic landscape that surrounds the development of housing and renewable energy projects in and around Uralla Shire,
- The stakeholder and community engagement conducted to contextualise and ground truth the findings from the quantitative analysis and provide an understanding of the priorities and concerns of local residents,
- The New England Renewable Energy Zone (REZ) and the associated potential costs and benefits to the Uralla Shire community,
- The housing market in Uralla Shire and the broader region, including recent sales and rentals, affordability, dwelling approvals and completions, and housing typologies,
- The historical and forecast population for Uralla Shire, including where that population is expected to change and what age groups are expected to grow or shrink over the coming decades, and
- The existing and required land supply for the development of housing in Uralla Shire.

This analysis supports a series of recommendations which will be inform the Draft Uralla Local Housing Strategy. These recommendations are focused on exploring evidence-based actions for the Local Housing Strategy that will support the housing needs of the entire Uralla Shire community.

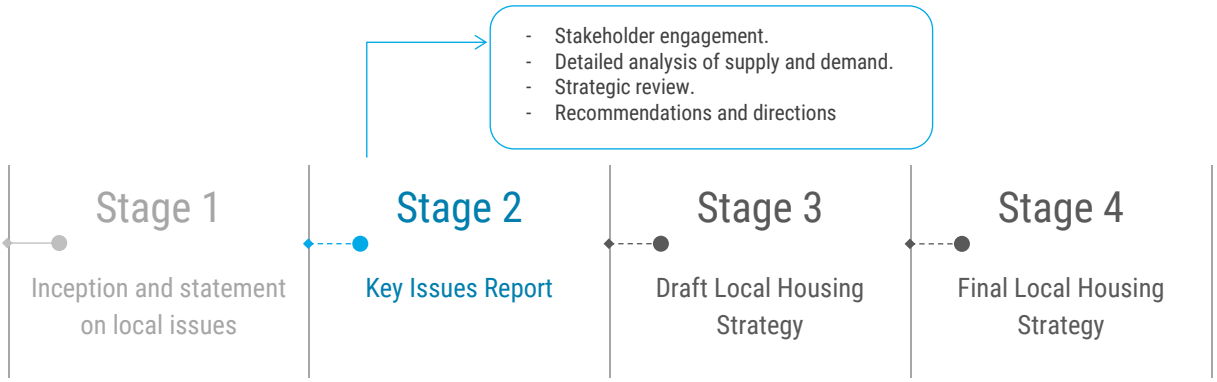


Figure 2 Uralla Local Housing Strategy Project Overview

3 Project Context

Key takeaways

Housing in focus, but a lack of strategic recognition -

Uralla has been largely overlooked in regional and state plans, and its local planning framework requires updating to guide future growth. At the same time, the region faces significant housing challenges, with traditional models of development unable to meet the growing demand from an influx of workers.

Energy transition uncertainty -

While there is a strong pipeline of projects in the REZ, supported by EnergyCo's New England REZ Transmission Line development, few projects have progressed to the construction phase. Many projects, including those led by EnergyCo, are still several years away from breaking ground. This presents both challenges and opportunities for Uralla to prepare for and capitalise on the coming renewable energy boom.

Significant employment demand -

The New England REZ will deliver significant renewable energy infrastructure, requiring an approximate 6,000 workers during construction and 2,000 workers during the operational phase. Only a portion of these will require accommodation around Uralla, however the relative impact on local dwelling demand will be significant given the current small housing market.

Uncertainty regarding project sequencing -

There are multiple major renewable energy projects which are likely to be delivered concurrently in the New England REZ. This poses significant workforce and supply chain challenges. The delivery of EnergyCo's New England REZ Transmission Line is a critical enabler for many other renewable energy projects in the REZ, and there are concerns that any delays or changes in the delivery of this project will threaten other projects.

Community benefit sharing revenue -

Community benefit sharing will provide meaningful annual revenue for the local community, particularly as more renewable energy projects are made operational in 2029 and 2031. Uralla Shire should consider how to best use this funding to support local infrastructure and housing needs.

3.1 Regional Overview

Uralla Shire is a local government area (LGA) located in the New England region of New South Wales, Australia. The Shire covers an area of approximately 3,230 square kilometres and is situated between two regional cities of Tamworth and Armidale. Uralla Shire is one of 12 local government areas within the New England North West Region. While Uralla is one of the smaller municipalities in the region in terms of population, it is strategically located on the major road between the regional cities of Armidale and Tamworth.

Uralla Shire is part of the New England Renewable Energy Zone (REZ)[1], which is set to play a significant role in the region's future development. The REZ aims to attract large-scale renewable energy projects, including wind and solar farms, and battery storage to the area. This initiative is expected to bring new economic opportunities and job creation to the Shire.

As of 2024, the population of Uralla Shire was over 6,000 residents, with the majority living in the town of Uralla and surrounding villages. Uralla is known for its rich history, creative community, and picturesque rural landscapes. These appeals have made tourism a significant draw card for the town, playing a key role in the local economy. Agriculture remains the main industry in Uralla Shire, with particular specialisation in sheep and cattle farming as well as wool production. The region is also known for its distilleries and breweries. With the development of the New England REZ, the renewable energy sector is emerging as a major industry for the area.

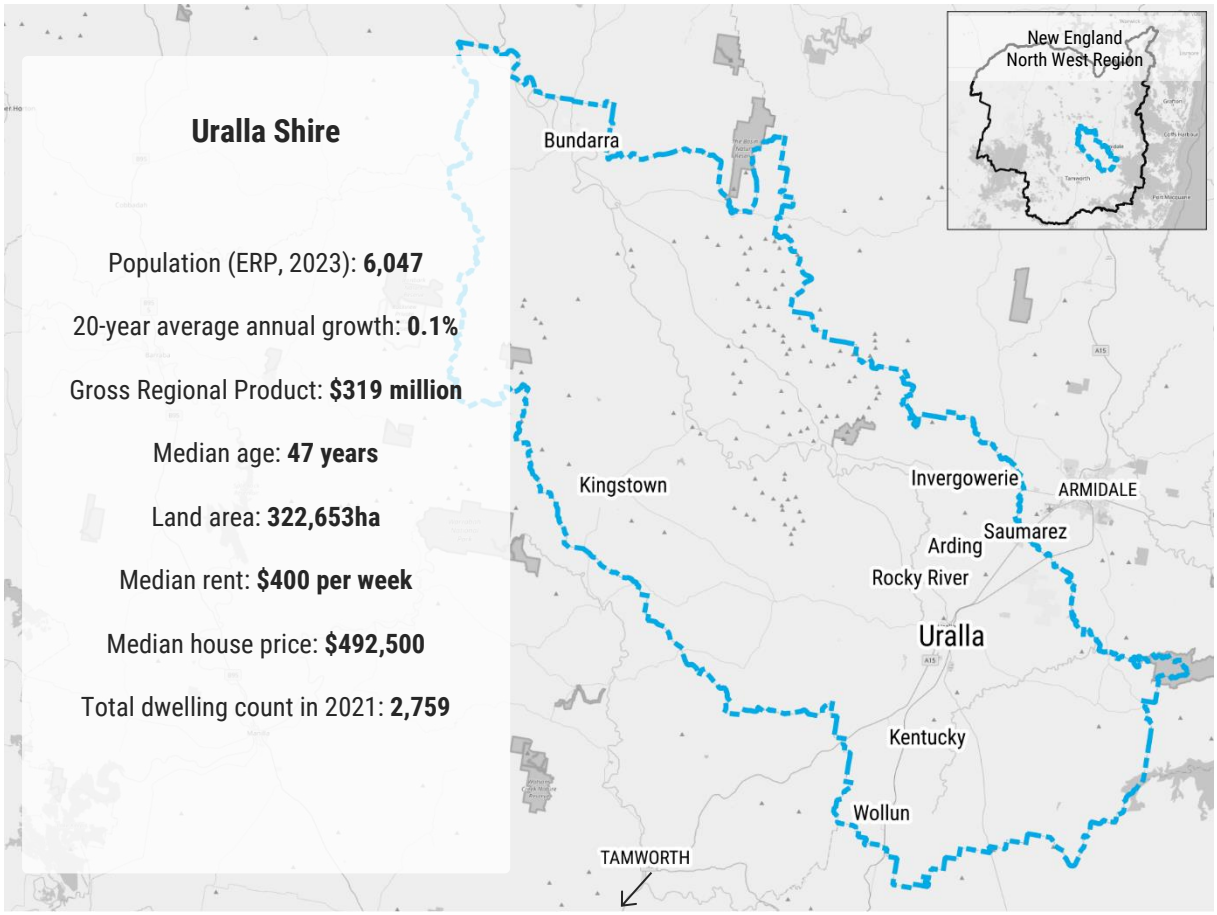


Figure 3 Uralla region map

3.2 Policy & Strategy Review

Local, regional, state, and national policies and strategies play a significant role in shaping the development landscape of Uralla Shire. Specifically, housing and energy policies are critical in guiding

[1] Renewable Energy Zones (REZs) are the equivalent of modern-day power stations. They combine: new renewable energy infrastructure, including generators (such as solar and wind farms), storage (such as batteries and pumped hydro) and high-voltage transmission infrastructure. REZs have been identified and mapped by the NSW Government.

the direction and priorities of the Uralla Local Housing Strategy. The role of housing policy is self-evident; however, the role of energy policy is also important as a major new driver of housing demand.

State and national-level policies and strategies typically have either a broad application across the nation and state or focus on the larger, fast-growing metropolitan regions. While applicable to regional areas, there is often no direct reference or focus on smaller councils such as Uralla. Policy and strategy begin to relate to local needs and opportunities at a regional level. However, again for smaller municipalities such as Uralla, the focus of regional plans is typically centred on the larger centres that provide concentrations of employment, population, and services. An overview of some of the key policies and strategies is illustrated in Figure 4 below, and a full analysis is provided in Appendix A.

Figure 4 Key housing and energy policies and strategies

The New England North West Regional Plan is one of the key documents that set the direction for strategic planning and land use for the region. Tamworth and Armidale are the region's identified Regional Cities, with Uralla being identified as a third tier 'Centre' (Figure 5). Housing affordability and diversity are key concerns raised in the Regional Plan. Reference to housing for Uralla relates to supporting new housing that maintains locations' respective character, with regional population growth being focussed in Moree, Tamworth and Armidale.

The Regional Plan indicates that encouraging appropriate renewable energy opportunities as a priority for Uralla, both community-led and private, however there is no reference to managing housing demand resulting from workers. The New England REZ is clearly identified as a major opportunity in the Regional Plan, but only in a broad sense, as the plan was published in 2022 before details emerged which showed that many renewable energy projects would be located in and around Uralla – including the significant transmission line upgrade project.

The New England REZ further strengthens Uralla's potential in the renewable energy sector. The REZ initiative comes out of the NSW Electricity Infrastructure Roadmap and focuses on clustering renewable energy projects around existing or future infrastructure. The New England REZ has the goal of generating up to 8 gigawatts (GW) of renewable energy from substantial public and private investment. Uralla stands to benefit from job creation, economic growth, and infrastructure improvements linked to REZ projects. Securing lasting benefit for local communities is an identified strategy within the Southern New England Regional Economic Development Strategy (REDS). Challenge lies in ensuring that renewable energy developments integrate well with local needs, maintaining Uralla's environmental and lifestyle values while fostering sustainable economic opportunities.

One of these challenges is managing the demand for accommodation resulting from a temporary workforce. While the matter of managing temporary worker demand is identified in more localised strategies, such as the Southern New England REDS and Uralla's LSPS, implementation through statutory mechanisms is currently lacking. The *Temporary and seasonal workers' accommodation Draft guideline* [2] prepared by the NSW Government suggests that these matters should primarily be implemented by local authorities through their LEPs, while also integrating demand into other strategies such as local housing strategies and rural land strategies.

Local level policy and strategy serve to implement broader policy directions, ensuring that development aligns with community needs while remaining consistent with regional, state, and national objectives. Uralla Shire's key planning documents (LSPS, LEP, DCP, and CSP) prioritise housing diversity and acknowledge the importance of flexible land use planning and infrastructure to support both permanent residents and a growing renewable energy workforce. While there is an awareness of the need to manage demand from temporary workers, statutory instruments do not specifically address this currently, and other strategies lack clear actions or directions to manage the demands associated with the upcoming investment in public and private projects. To address these gaps, a comprehensive housing strategy is needed to ensure the Shire can meet the evolving needs of both its stable population and the influx of workers from REZ projects.

[2] NSW Department of Planning and Environment, August 2023

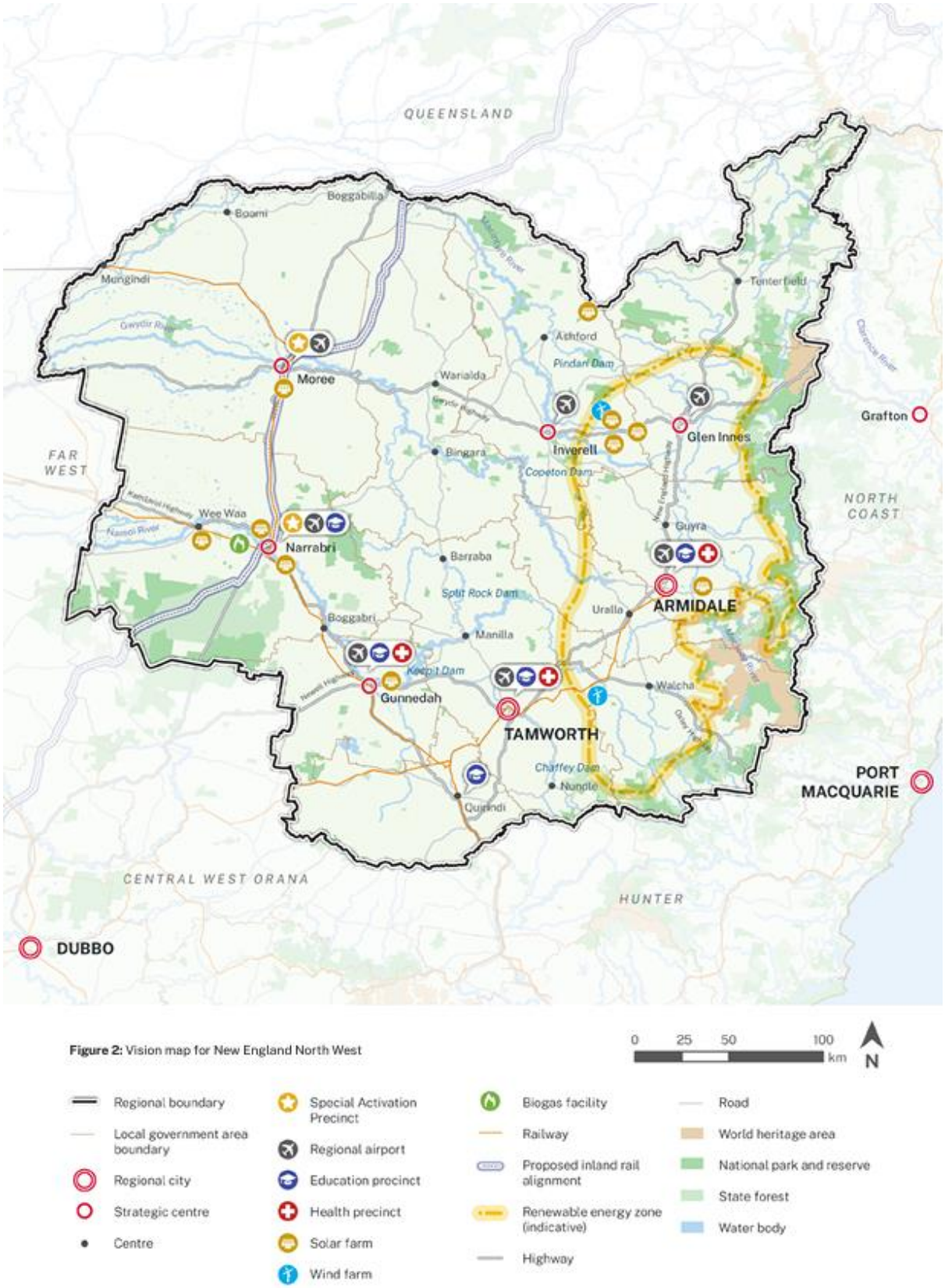


Figure 5 Vision map for New England North West (Source: New England North West Regional Plan)

3.3 New England Renewable Energy Zone

The New England REZ is one of five designated clean energy areas in NSW, designed to support the state's transition to renewable energy. It is expected to deliver up to 8 GW of new transmission capacity, with the potential to power approximately 3.5 million homes. The zone is strategically located near existing high-voltage power lines, facilitating the connection between the NSW east coast and Queensland, thereby enhancing energy resilience and export capabilities. For the potential of the REZ to be realised, substantial public investment is being undertaken to upgrade and extend network infrastructure.

EnergyCo anticipate that the New England REZ will attract around $24 billion in private sector investment by 2034 after the transmission line project is completed, providing over 6000 jobs in construction and about 2000 ongoing operational jobs – demanding significant local labour and resources to support its construction and operation. Many of the towns impacted by the REZ – including Uralla - have very small populations, effectively requiring hundreds or thousands of workers to temporarily relocate and be accommodated within towns with little existing housing and labour available.

EnergyCo are currently undertaking cumulative impact studies to assess the impact of the multitude of renewable energy projects planned or underway in the REZ – many of which are projected to be constructed concurrently as they aim to align their commissioning with the activation of EnergyCo's transmission line. These concurrent projects will have significant requirements for construction workers accommodation, and Uralla's recent experience from the New England Solar Farm suggest that this can have a substantial impact on the availability of local housing. As cumulative impact studies are not yet complete, it is critical for Uralla to anticipate the cumulative impact that these projects will have on housing in the Shire.

While energy proponents are required to consider worker accommodation in their project applications, detailed worker accommodation planning is typically not conducted until after the project is approved. Without cumulative impact studies and adoption of the *Temporary and Seasonal Workers' Accommodation Guideline* into Uralla's LEP, it is difficult for proponents to prepare for – or councils to respond to – the need for significant worker accommodation.

Figure 6 New England Renewable Energy Zone (Source: EnergyCo)

REZ Projects

The scale of renewable energy projects in the New England REZ is significant. Thousands of workers will be required to construct the network infrastructure, generation and storage projects over the course of the next decade. As projects are completed, an ongoing workforce will be required to operate and maintain these assets over their lifetime. Renewable energy projects are known for their relatively low operational workforce relative to the quantity of workers required throughout the construction phase.

An operational workforce is, by its nature, long-term and relatively stable. Many of the operational workforce may move to or already live in the region, with a proportion potentially moving with families. For regions such as Uralla, projects that encourage new family-age populations can be extremely beneficial.

Managing the demands from the short-term construction workforce can be more difficult, particularly for smaller towns. The scale and short-term nature of a construction workforce can create challenges including accommodation pressures, strains on local services, social and cultural tension, and potential for anti-social behaviour.

At the same time, there are significant benefits that can be realised from the projects and the workforce they bring. The surge in workers can bring notable short-term economic gains. Exposure to the lifestyle in the area may also motivate a small number of workers to move to the region.

An important part of this project has been to establish a plausible scenario of residential demand resulting from the renewable energy projects in the local Uralla area. While there are many projects within the REZ, as well as outside, not all of these will generate demand for Uralla. Projects north of Armidale or proximate to Tamworth, for example, will likely seek to accommodate workers within those respective regional cities due to relative proximity to project sites and greater capacity of the housing sector.

Reducing the travel time from accommodation to the project site is a major factor when deciding where to locate construction worker accommodation. Engagement between Uralla Council and respective developers, including EnergyCo, has indicated that finding sites within a one-way commute of 45 minutes is the targeted travel time as this improves project delivery, reduces the need for additional workplace health and safety measures to be introduced, and reduces the costs associated with paid travel time.

Uralla's central location within a 45-minute travel-time of many major projects, including network infrastructure, is a major attraction for project proponents.

While the combination of generation and storage projects being proposed by the private sector is significant, the single largest project, in terms of timeframe and workers, in the region is the transmission infrastructure being proposed by EnergyCo. The image in Figure 7 illustrates the extent of projects that are captured within 45-minute travel time of Uralla.

EnergyCo has been actively engaging with Uralla Council seeking potential sites to support both accommodation as well as industrial activity such as hard stand areas. Private developers also have been making enquiries to Council about potential sites proximate to the township as the accommodation issue has become increasingly evident.

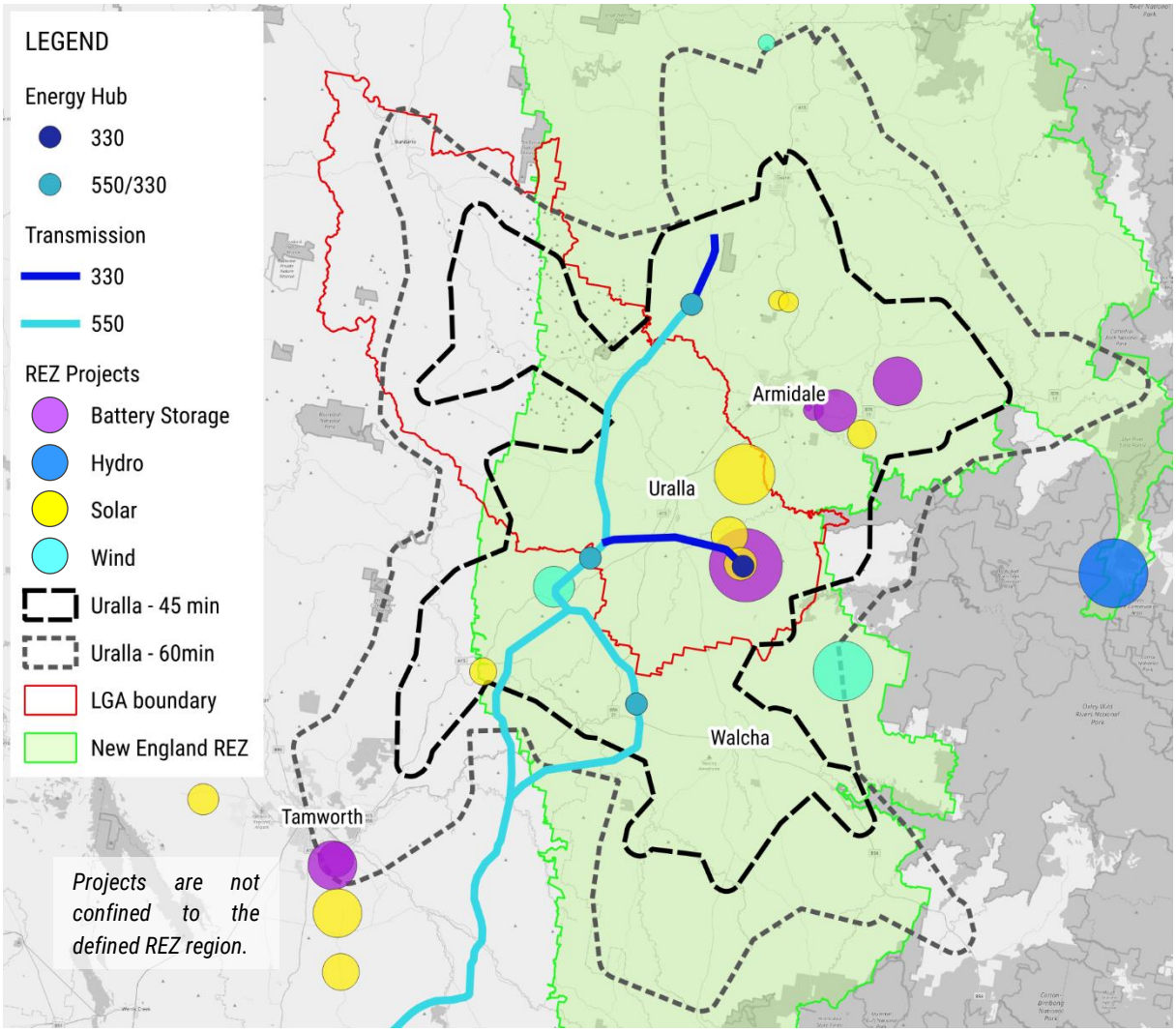


Figure 7 REZ projects and travel time from Uralla

Renewable energy projects in the REZ are at varying stages of approval and development. REMPLAN has been provided with a list of known projects by EnergyCo and have verified and added to that list through the Major Project search on the NSW Government's Planning Portal[3]. A list of projects within the New England REZ is provided in Table 2 below. This list is current at the time of this report's preparation, however there are other projects which are known to be in planning phase and expected to be submitted in the coming months. As new projects will be added to the list, some may also be withdrawn while others may not proceed to development at all. This is reflective of the complex and uncertain financing and nature of these projects.

This list consists of energy generation projects, battery storage projects, and energy transmission projects that are in the New England REZ. The list of projects that are currently approved or under assessment result in a significant number of construction jobs over the period of many years, with future projects adding to this number. Due to individual project locations, not all are likely to be serviced by a workforce located within Uralla Shire. This list is utilised later in the report (see Section 6.4) to inform potential growth scenarios resulting from the delivery of projects that are proximate to Uralla.

[3] https://www.planningportal.nsw.gov.au/major-projects

Table 2 Generation, Storage and Transmission Projects planned or developed in the New England REZ.

Project	Generation category	Size (mw)	Est. peak construction jobs	Est. ongoing operational jobs
Eathorpe BESS	Battery Storage	100	100	3
Gunnedah East BESS	Battery Storage	120	80	2
Armidale BESS	Battery Storage	150	80	10
Glen Innes BESS	Battery Storage	150	75	3
Calala BESS	Battery Storage	300	170	7
Kingswood BESS	Battery Storage	500	100	2
Armidale East BESS	Battery Storage	500	70	5
Gara BESS	Battery Storage	400	70	5
Oven Mountain Pumped Hydro	Hydro	900	647	95
New England Solar Farm	Solar	720	700	15
Tilbuster Solar Farm	Solar	150	125	5
Oxley Solar Farm	Solar	225	300	5
Nottingham Park Solar Farm	Solar	250	500	10
Sundown Solar Farm	Solar	600	200	2
White Rock 2 Wind Farm	Wind	171	200	2
Rangoon Wind Farm	Wind	130	150	10
Thunderbolt Wind Farm	Wind	380	350	10
Winterbourne Wind Farm	Wind	705	300	16
New England REZ Transmission Lines	Transmission	6-8GW Transmission Capacity	1,250	Unstated

(Source: Project Scoping Studies or Environmental Impact Statements retrieved from the NSW Planning Portal)

The list in Table 2 above indicates the scale of the energy transition in the New England Region. This list is not complete, as indicated above new projects are looking to be submitted in the near future. In addition to this, there are other projects occurring outside the official REZs, such as those around Tamworth (Figure 7 above).

The New England REZ is one of five REZs declared by the State Government under the *New South Wales Electricity Infrastructure Act 2020*. However, this is only part of a much broader set of REZs established by the Australian Energy Market Operator (AEMO) for the National Electricity Market. In 2022, AEMO had identified 41 REZs, including offshore wind zones, across the eastern and southern Australian states and territories (Figure 8 below).

While assessing demand within each of these REZs is beyond the scope of this project, an examination of indicative demand within the New England REZ alone, one of many such zones, highlights clear pressures and constraints on the inputs required to deliver projects. This would include factors such as materials, labour, and logistics. These market constraints will likely naturally limit the number of projects that can be delivered at a given time. This is discussed further in Section 6.4 below in regard to potential growth scenarios resulting from REZ project developments.

The number of projects in the New England REZ will likely create constraints, but there are also benefits. Legacy infrastructure opportunities are one such opportunity, but another is the direct financial contributions that can be made through benefit sharing arrangements.

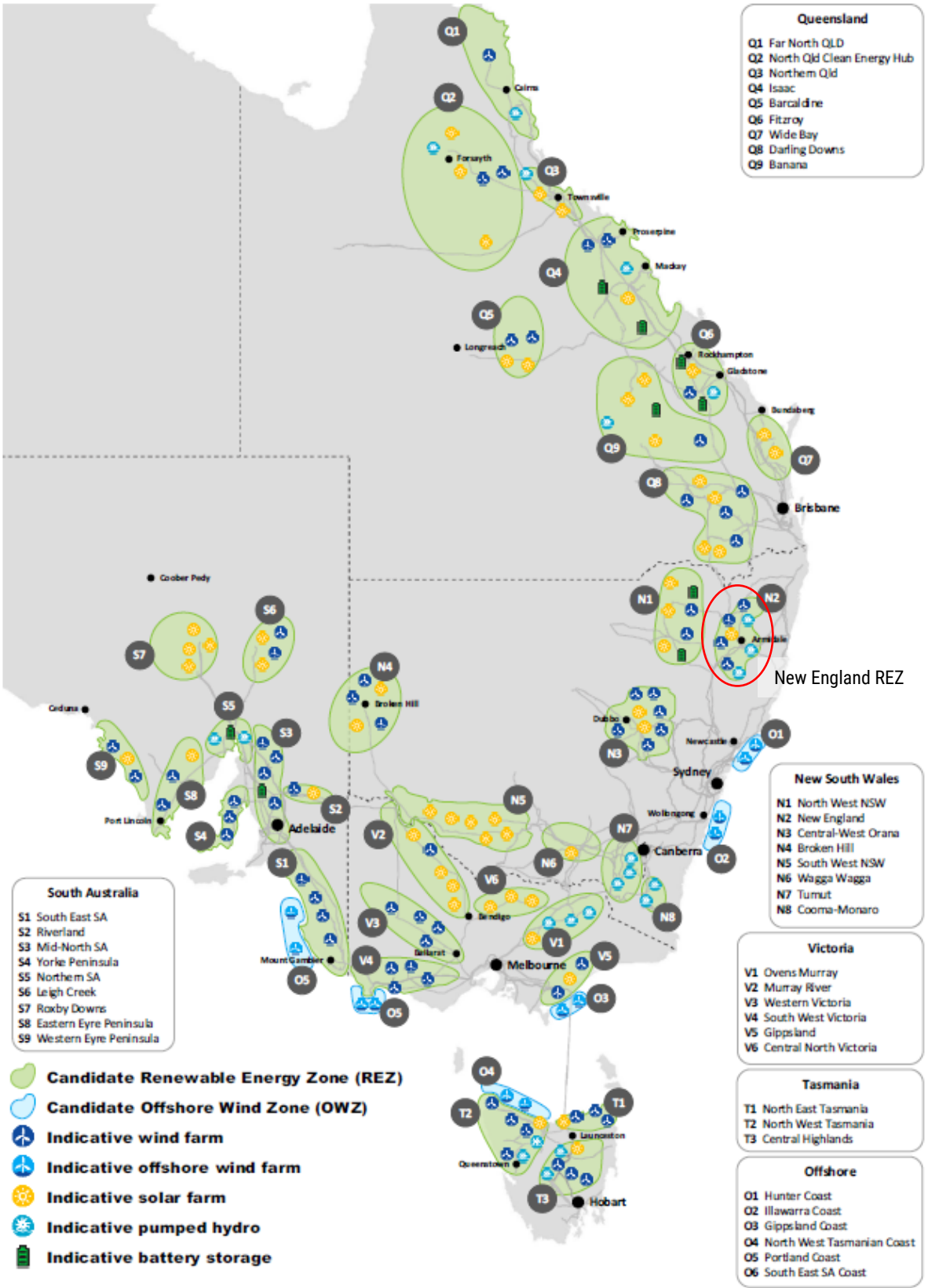


Figure 8 2022 REZs and OWZs (Source: AEMO Integrated System Plan 2022)

Renewable Energy Project Benefit Sharing

The Draft Benefit Sharing Guideline indicates that the benefit payments from renewable energy projects are typically administered by the local council that the project is located in. In some cases, other non-government organisations may be better positioned to administer the fund.

In the New England REZ, some renewable energy projects may be primarily serviced by neighbouring LGAs rather than the LGA it is located within. An example of this is the Winterbourne Wind Farm, located in Walcha Shire, which is likely to be predominantly serviced by Uralla Shire.

As the Draft Guideline is finalised, Uralla Shire and other LGAs within the New England REZ should work with renewable energy developers to consider how best to allocate community benefit funds across LGAs where multiple LGAs are servicing individual projects. The benefit sharing rate suggested in the Draft Guideline is:

- $850 per megawatt per annum for solar energy development, or
- $1,050 per megawatt per annum for wind energy development, paid over the life of the development and indexed to CPI.

Uralla Shire has four solar and wind projects that are within its borders, though it is likely to service others due to its central location within the New England REZ. Those four projects are:

- New England Solar Farm (approved prior to adoption of Council's benefit sharing policy at a reduced contribution rate of $250 per megawatt per annum. 400MW already operational, 320MW Stage 2 operational from 2029)
- Deeargee Solar Farm (400MW, operational from 2029)
- Hillview Solar Farm (300MW, operational from 2031)
- Thunderbolt Wind Farm (350MW, operational from 2029)

Case study: New England Solar Farm

The New England Solar Farm is a 720 MW solar farm being built in stages on 2,000 hectares of grazing land in Uralla Shire. Stage 1 (400 MW) began generating electricity in December 2023, and by the completion of Stage 2 it will be generating 720MW with over 1.5 million solar panels and a 200 MW/2 hour battery.

The New England Solar Farm provides important contributions through an existing community benefit scheme. However, the current value which was established prior to current guidelines, equates to 23.5% of the value stated Uralla Shire's current community benefit sharing policy.

(Image Source: ACEN Australia)

Under the above operational timeline scenario outlined by project proponents, Figure 9 below shows the cumulative revenue which Uralla Shire could expect to generate per annum from the four listed renewable energy projects.

Currently, New England Solar Farm is the only project contributing to the community benefit fund, contributing $80,000 per annum. In 2029 when New England Solar Farm Stage 2, Deeargee Solar Farm, and Thunderbolt Wind Farm become operational, this per annum revenue increases to $887,500. By 2031, when Hillview Solar Farm becomes operational, this revenue increases to its maximum rate of $1,142,500 per annum.

These rates may be subject to change and CPI adjustment, and Uralla may be able to capture additional community benefit funding from additional projects which are serviced by Uralla but sit outside of the Uralla Shire LGA.

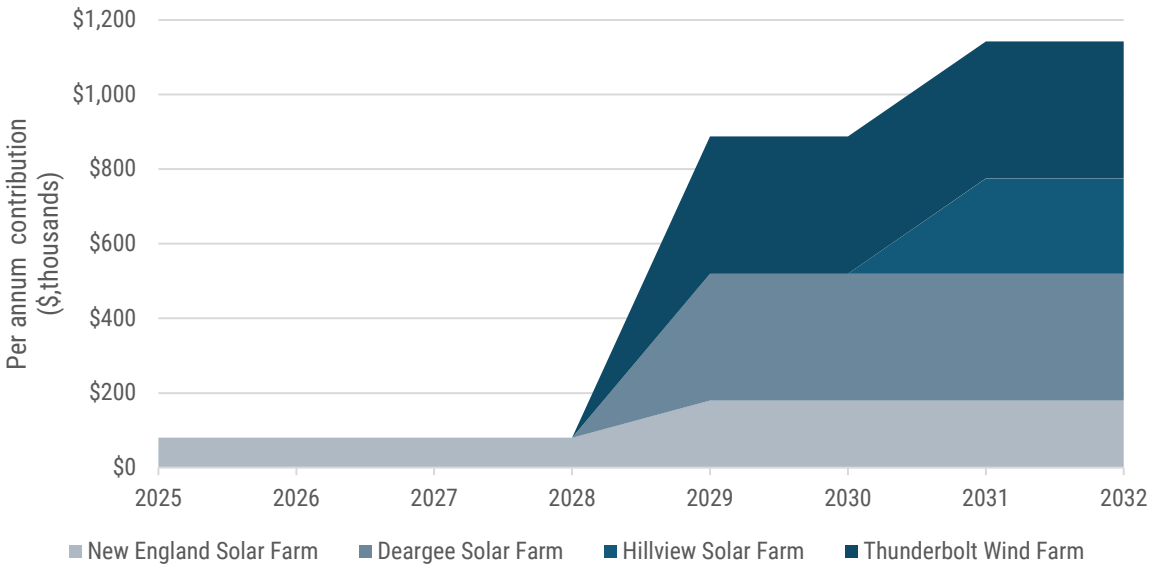


Figure 9 Annual expected revenue from renewable energy projects within Uralla Shire (Source: NSW Planning Portal, Draft Benefit Sharing Guideline and Uralla Shire's Renewable Energy Community Benefit Policy)

4 Engagement Outcomes

Key takeaways

Housing affordability and market pressures -

Rising housing demand from renewable energy projects and the growth of short-term rentals have strained the local housing market, driving up rents and displacing residents. Uralla Shire needs innovative solutions, such as affordable housing retrofits, better regulation of short-term rentals, and new funding mechanisms, to address these affordability challenges.

Temporary construction worker accommodation -

A lack of planning for temporary worker housing has intensified local market pressures, but it also presents an opportunity. Repurposing potential future worker accommodations into permanent housing, if properly standardised and managed, could help address long-term housing needs and minimise social impacts.

Demographic-specific housing needs -

Uralla's ageing population is driving demand for new housing typologies that are currently underprovided or not available. This includes lower-maintenance private sector housing and independent living communities. Addressing these gaps is crucial to meeting the diverse needs of the community.

Infrastructure and strategic planning -

Housing development is constrained by infrastructure limitations and zoning challenges, necessitating coordinated upgrades and long-term planning. A lack of consistent standards for infrastructure combined with inconsistent messaging from Council has stifled development in the recent past. Deferred contribution recovery mechanisms could also support development of underutilised land where 'first mover disadvantage' exists.

Balancing community expectations with economic opportunity -

Engaging the community in housing strategies and leveraging the economic benefits of renewable energy projects are critical to maintaining local support. Strategies must balance economic growth with preserving Uralla's character, while addressing funding limitations for infrastructure improvements.

4.1 Overview

Engagement to inform the Draft Uralla Local Housing Strategy was conducted in two stages – Stage 1 comprised of in-situ engagement in Uralla engaging with a range of stakeholders to understand issues, constraints, and preferences as they are experienced by the local resident and business community. Stage 2 comprised of online engagement with regional and state stakeholders to understand project pipeline, worker accommodation planning, and broader considerations for the New England REZ.

4.2 Engagement Details

Timing

In-situ stakeholder engagement was held between August 13, 2024, and August 15, 2024. Subsequent online engagement was held between September 3, 2024, and September 9, 2024.

Format

- Discussions were held in person in Uralla for all Uralla-based stakeholders, and these discussions were typically between 30 minutes and two hours. These Uralla-based discussions were attended by REMPLAN and a representative from Uralla Shire Council.
- Subsequent engagement with State Government stakeholders, renewable energy project developers, a worker housing provider, Homes North, Armidale Regional Council and Urbis was held online with representatives from both REMPLAN and Uralla Shire Council.

4.3 Outcomes

Housing affordability

Rising rents and housing demand

The construction of renewable energy projects, such as the New England Solar Farm, has significantly impacted local housing markets, leading to sharp increases in rent. There were concerns about the displacement of local residents as rental properties were occupied by temporary workers. This displacement has been widely reported in other towns impacted by major infrastructure projects and has anecdotally already occurred in Uralla during the construction of renewable energy projects.

Innovative housing solutions

Ideas such as rent-to-buy schemes, building retrofits for affordable housing, and the development of smaller, more affordable housing units were advocated for by the local community and the Uralla Shire Councillors. There was also interest in exploring funding opportunities through new developer contribution plans to support affordable housing initiatives in Uralla.

Construction worker accommodation

Worker accommodation strategies

Temporary worker accommodation was identified as essential for managing the housing demands created by large-scale energy projects – particularly in places like Uralla where the existing amount of housing stock is low, and the rental vacancy rate is also low. In many cases, Scoping Reports from renewable energy project applications did not include provisions for on-site accommodation or adequate off-site housing plans, which may lead to increased pressure on local housing markets. Some proposals included temporary housing developments which may be converted later for potential legacy benefits, such as converting worker camps into permanent housing.

Standards of worker accommodation

Many Enterprise Bargaining Agreements (EBAs) include provisions which strongly recommend or enforce standards of worker accommodation which may limit the ability to use existing housing stock for worker accommodation solutions. Primarily, this relates to the preference or requirement to provide ensuites for each worker. Some excerpts from EBAs relating to bathroom provisions include:

- "The preferred standard of suitable accommodation is a well maintained, air-conditioned single motel style room with radio/television and ensuite bath/shower and toilet facilities with access to a refrigerator for the storage of Employee's food and beverages."
- "…have a single room with ensuite in a well-kept establishment with two (2) adequate meals each day provided by the employer and a per day allowance"
- "Reasonable board and lodging means, a minimum of three adequate meals per day, and a single room (not shared) which is quiet with air conditioning/heating, suitable ventilation, comfortable and clean bedding, appropriate lighting and furnishings, an ensuite with a toilet, shower and basin both with running hot and cold water, a television and tea and coffee making facilities. All facilities must be clean and fully functioning."
- "Where possible, the Company will provide the Employees with accommodation that, at a minimum, is a single room, with no shared bathroom amenities, WIFI and adequate cooking facilities (where no meals are provided)."
- "The Company will make all reasonable attempts to ensure that employees will not be required to share bathrooms."

Existing housing in Uralla is predominantly three-, four-, and five-bedroom housing with one or two bathrooms, limiting the ability to efficiently use this housing to accommodate workers.

Legacy housing opportunities

The concept of leaving a positive legacy from temporary worker accommodation was explored. This included ideas like transitioning temporary dwellings into affordable housing for local residents or planning to retain the trunk infrastructure to enable expedited redevelopment of the land for long-term residential use. The need for collaboration between renewable energy companies, local councils, and developers was highlighted to ensure these legacy benefits. There was consensus amongst community members, community groups, Uralla Shire Council, and renewable energy developers that an overreliance on demountable donger-style temporary worker accommodation which was removed at the conclusion of the project is not a desirable outcome.

Centralised vs. decentralised worker accommodation

Various options for accommodating temporary workers were discussed throughout the engagement, from the more traditional on-site temporary camps, repurposing local accommodation, through to purpose-built semi-permanent worker villages. There were debates on whether worker accommodation should be located closer to town centres or on the outskirts. Centralised accommodation was preferred for better access to services, better economic outcomes, and reduced displacement of local residents, while decentralised options could help alleviate pressure on local infrastructure.

Challenges in implementation

Many approved renewable energy projects did not include on-site accommodation in their plans, accommodation strategies not being required until after approval was granted, leading to a lack of preparedness in managing the housing needs of temporary workers. Many projects indicated that workers would be required to find their own accommodation in the local market. More recently, some project proponents who now have experience in the region have recognised the accommodation pressures and are planning for potential temporary worker camps. The infrastructure required to support large-scale worker accommodation was often underfunded or overlooked.

Case study: Prefabricated homes

Prefabricated houses have a range of benefits, but also have some issues. Homes are extremely fast to build, taking as little as 2 months from commencement to completion on-site. Risk of delays are significantly reduced due to the controlled construction environment. By comparison, a standard on-site build will take between 6-12 months.

Some, not all, prefabricated homes can find it difficult to meet BASIX standards. There are also sometimes negative community perceptions associated with prefabricated homes. However, with more contemporary designs and techniques are addressing both these issues.

Arguably the biggest hurdle to wider adoption of prefabricated homes is access to finance. Most traditional lenders will not provide standard loan terms, meaning that this form of housing is only accessible to people with sufficient cash or equity to fund almost the entire cost up-front.

Located only 20 minutes away in nearby Armidale, Uniplan is at the forefront of building modular, prefabricated housing in Australia. These houses are used for regular residential accommodation, tourism rentals, and lifestyle villages, and several Uniplan designs are specifically designed to accommodate workers.

Short-term rentals

Sharp growth in short-term housing

The increase in short-term rental properties has contributed to the housing affordability crisis in Uralla. Properties being converted to short-term rentals have reduced the availability of long-term rental housing, further exacerbating the housing shortage for locals.

Regulation and management

There is a need for better regulation of short-term rentals to ensure they do not displace long-term residents. Discussions included how to balance the economic benefits of short-term rentals with the

need to maintain sufficient housing stock for local residents. Some houses being let to temporary workers were being occupied by more occupants than were permitted resulting in overcrowding and potential disruptions to neighbours.

Retirees and independent living accommodation

Demand for retiree housing

The growing retiree population in Uralla requires housing options that cater to their needs, such as low-maintenance, walkable locations, and proximity to healthcare services. The lack of suitable 1- and 2-bedroom units and semi-assisted living facilities was identified as a gap in the local housing market. There is an increasing number of inquiries from retirees, seeking to move to Uralla, highlighting the need for targeted housing strategies to accommodate this demographic. A notable number of stakeholders raised the issue that while McMaugh Gardens provided an aged care option, there was nothing that bridged the gap between the time people left the family home and went to McMaughs.

Residential aged care needs

The region has limited aged care facilities, pushing the need for developments that provide both independent living options and more intensive care services for elderly residents. The strategy should consider expanding nursing home-style developments and facilities catering to active retirees.

Case study: Warnum Community Aged Care Conversion

The Western Australian Government recently committed $2.9 million to remediate and commission the former Warmun aged care facility into a workers' hostel. The hostel will house up to 12 workers in community and will include space for social enterprise development and service hubs.

The facility will require remediation and changes to the internal layout, but the relative ease of conversion suggests that the reverse conversion from workers' accommodation into an aged-care facility is a viable option for facilities built in Uralla Shire.

(Image Source: ABC News)

Infrastructure and land use planning

Infrastructure limitations

The development of new housing is constrained by existing infrastructure, particularly stormwater. Uralla is well-serviced with sewer, with Council indicating sufficient capacity to accommodate growth. Access to a secure water supply has previously been a considerable issue, however backup underground reserves have been identified that will sure up supply in times of drought. However, there are ongoing water quality concerns expressed by residents following restrictions back in 2019.

There were repeated concerns about the lack of publicly available information on infrastructure location and condition, as well as the absence of clear standards for infrastructure extensions. More transparent, open data and an established set of infrastructure standards would assist local developers and industry professionals such as engineers and surveyors.

Infrastructure prioritisation

Upgrading and prioritising infrastructure, particularly in areas likely to see new development, was seen as crucial. There was discussion on the need for better infrastructure planning, such as stormwater management and road upgrades, to support future housing developments.

First mover disadvantage

There are issues relating to equity of cost distribution for infrastructure that may be required to unlock some properties for development. Subdivisions often require infrastructure upgrades that benefit multiple properties, but the current approach from Council lacks robust cost-sharing mechanisms to ensure equitable contributions. For example, one landowner may face upfront costs for roads or utility connections that also benefit neighbouring properties, with no clear recoupment process. This can be a barrier to development.

Land use zoning

Zoning decisions, particularly in relation to R5 and R1 land, are critical. Some areas are facing constraints due to bushfire risks and biodiversity concerns, limiting the potential for development.

Community engagement and social impact

Community involvement

Encouraging local community involvement in housing strategy development was seen as a way to make projects more acceptable and successful. This included getting locals involved in mapping and planning exercises, as well as fostering a proactive approach to housing issues.

Social license and legacy

Renewable energy developers are increasingly focusing on securing a social license by ensuring that worker accommodation projects leave a positive legacy for the community, such as converting temporary housing into permanent homes at the conclusion of a project.

Community benefits from renewable energy projects

Ensuring that local communities benefit from the economic opportunities created by renewable energy projects, rather than being adversely affected by housing shortages and rising costs, was a key concern

raised across all stakeholder groups. Stakeholders were keen to understand how to integrate worker accommodation into the community in a way that supports long-term housing goals and local prosperity.

Economic considerations

Economic diversification

There's a concern about Uralla becoming a "faceless suburb" of larger cities like Armidale. Strategies should consider how to maintain the town's character while promoting sustainable economic growth. Expanding Uralla towards Armidale through more land releases should be avoided if it jeopardises the compact walkability and community feel that Uralla enjoys.

Rate pegging and funding

Financial constraints, such as rate pegging, have limited the council's ability to fund infrastructure improvements. The housing strategy may identify new funding opportunities, such as developer contributions, and the Draft Benefit Sharing Guideline may help clarify the contributions that renewable energy developers are required to make.

Coordination and timelines

Coordinating shared worker accommodation facilities

Most stakeholders expressed a preference for a shared, centralised approach to worker accommodation which leaves a positive legacy for the community, industry stakeholders expressed concern that relying on a shared solution added risk and uncertainty to their projects' feasibility and timeline, as they would need certainty that the requisite capacity would be available for their project exactly when required.

There were also concerns regarding the standards and provisions of the worker accommodation, as different industries or workers may have different EBAs which require different standards of amenities.

There was also concern that sharing facilities between different operators may lead to difficulties in enforcing behavioural standards, maintaining transparency between operators and the local community, and ensuring a safe environment for all workers.

Transmission line uncertainty

Renewable energy developers have expressed some concern about the timely rollout of EnergyCo's transmission lines in the New England REZ, and in some cases, they have developed contingency plans which will allow them to access other transmission networks instead. Delays to EnergyCo's transmission lines threatens the overall viability of many renewable energy projects and the potential for Australia and New South Wales to meet their energy transition commitments.

Case study: Macintyre, QLD

Powerlink's Mcintyre Transmission Project has recently completed construction on 65km of transmission lines – including 165 towers – connecting the 923MW Macintyre wind project to South East Queensland.

This project required a workforce of 220 construction workers with an initial estimated construction timeline of 18-24 months. EnergyCo's New England REZ Transmission Project is significantly larger, covering 560km of transmission lines and connecting to many projects rather than one specific wind energy project. This will require a much larger workforce and will likely entail much more complex project management.

(Image Source: Powerlink)

Market-based project sequencing

While no formal project sequencing has been coordinated, developers have stated that it is likely that some renewable energy projects will be required to delay commencement until the conclusion of other projects due to supply chain and workforce constraints (i.e. both projects will require full capacity from the same specialist tradespeople and quarries).

4.4 Sentiment Analysis

During stakeholder and community engagement, REMPLAN gathered direct responses from all engagement sessions with stakeholders. While in-person engagement was strong during the public engagement session, with many members of the public providing their feedback directly to REMPLAN and Uralla Shire Council representatives, only limited formal responses were received from a publicly available online survey. While relying on notes rather than direct responses presents risks in ensuring accuracy and fair representation, all efforts were made to ensure feedback was captured accurately and fairly and the inclusion of these notes ensures a broader and more representative sample of community feedback.

These direct responses and REMPLAN's written notes were compiled and input into a sentiment analysis program. Sentiment analysis is a process that determines the emotional tone behind text. The

result of the analysis was consistent with the points above, but notably key issues could be ranked in terms of importance (derived from term frequency). Ranked from most to least important, those issues are:

1. **Housing Availability and Affordability:**
   - There is a significant lack of available housing, both for purchase and rent, which is exacerbating affordability issues.
   - The influx of workers for renewable energy projects is putting additional pressure on the housing market, leading to higher rents and reduced availability for local residents.
   - There is a demand for a mix of housing types, including affordable housing, social housing, and housing suitable for retirees and low-income families.

2. **Infrastructure and Services:**
   - There are concerns about the capacity of existing water and sewerage infrastructure to support new developments and the potential impact of drought conditions.
   - The community has recognised that there are already issues with existing stormwater drainage systems, which need to be addressed to support further development and prevent flooding.
   - The need for improved digital connectivity to support modern living and business needs will be important for economic development in Uralla.

3. **Community and Social Impact:**
   - There is a need for well-planned worker accommodation that integrates with the community and provides long-term benefits, rather than temporary solutions that could disrupt local life.
   - The community emphasised the importance of ensuring that social services, including healthcare and support for vulnerable populations, are adequate to meet the needs of a growing and changing population.

4. **Environmental Concerns:**
   - The impact of development on local biodiversity is a major concern, and there is a need for proactive measures to protect and enhance natural habitats.
   - There was a strong emphasis on energy and water efficiency in new developments and the importance of planning for long-term environmental sustainability.

5. **Economic Development:**
   - Ensuring that local businesses can thrive and benefit from new developments, including renewable energy projects, will be important for economic development and social licence.
   - The need to create and support employment opportunities for local residents is imperative, particularly in the context of large-scale energy projects and their associated workforce demands.

5 Housing Market Assessment

Key takeaways

Limited housing stock with low vacancy

Uralla has limited housing stock to accommodate for population growth associated with the renewable energy projects being delivered for the New England REZ. Uralla experienced low rental vacancy rates during the delivery of the New England Solar Farm Stage 1.

Limited delivery of new housing, despite approvals

There has been a disparity recently between building approvals and building completions, suggesting there are other regulatory or market conditions which are limiting housing delivery. The overall amount of new housing is also relatively low, meaning transitioning housing to meet the needs of the current and future population will take time.

Poorly suited house sizes

Like other rural townships, Uralla has an increasing number of one- and two-person households occupying large houses with two, three, or four spare bedrooms. Despite shrinking household sizes and clear demand to accommodate an ageing population, most new houses are larger, exacerbating the housing-population mismatch.

Rising housing costs and high rate of low income households

Uralla has historically been a relatively affordable location but now has the highest median house price in the region. Despite this, there is still a very high proportion of households classified as very low and low income. The result is rapidly declining affordability.

Potential for more investor development with rising prices

Rising prices could begin to attract developers and investors who are typically the main source of smaller housing that is required to meet future demand of households in Uralla.

5.1 Overview

The housing market is influenced by a range of factors, including economic conditions, demographic trends, and local supply and demand dynamics. Economic indicators such as employment rates, income levels, and interest rates directly impact buyer confidence and affordability, shaping the overall market activity. Demographics also play a significant role, as population growth, household composition, and migration patterns affect the demand for housing. Additionally, policy settings like zoning regulations, planning frameworks, and housing incentives can either stimulate or constrain the development and availability of housing stock, influencing market balance.

In smaller townships like Uralla, these broader market factors are felt in unique ways. The scale of the local economy, limited housing stock, and slower population growth often mean that market dynamics are more sensitive to localised changes. Employment opportunities, lifestyle appeal, and access to essential services can significantly impact demand, while supply constraints are sometimes heightened by perceived levels of demand and expertise of the local development sector rather than availability of land.

This section of the report will explore several market indicators, or supply and demand metrics, to provide some insight into the current state and performance of the housing market.

5.2 Sales and rental market

The sales and rental market are demand indicators, with factors such as higher prices and lower time on market indicating greater demand.

Across the four municipalities in the region, the median sale price of houses has been increasing, particularly since the COVID period in 2020. This has been a common experience across much of the country, where locations that were previously considered affordable have experienced considerable price increases.

For Uralla, the relative price difference compared to the region indicates increasing demand. Houses in Uralla were typically lower than in Armidale and Tamworth (and the region generally), however this has shifted in recent years. Since 2021 house prices in Uralla have been higher than the region overall and in 2023 were the highest in the region. This has been accompanied by increasing number of sales, though these have declined since the peak in 2021.

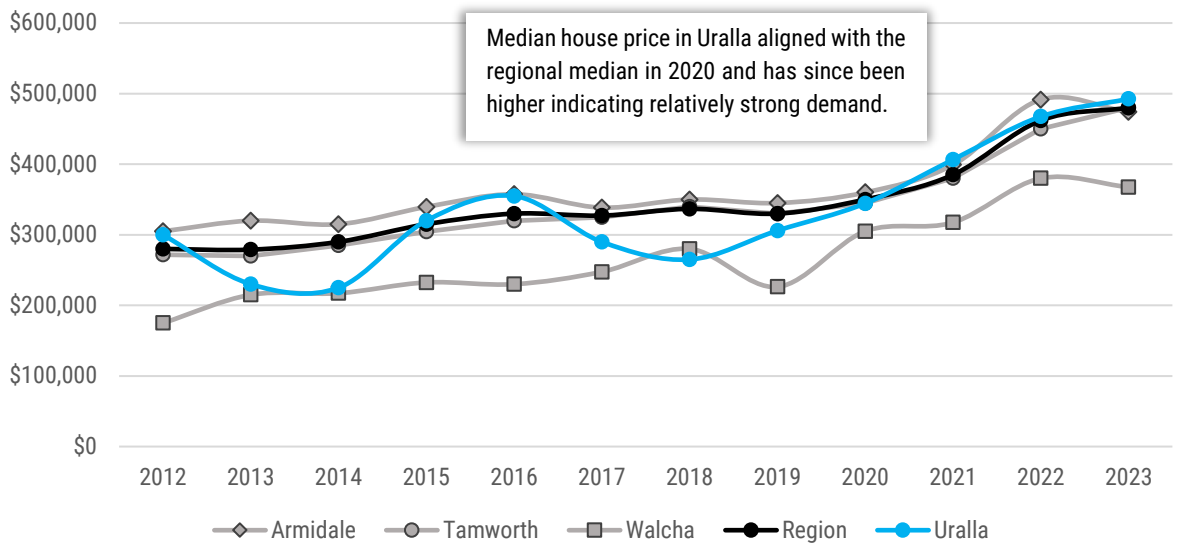


Figure 10 Median sale price, houses (Source: REMPLAN Housing)

Uralla has a very low proportion of renters compared to the region as a whole. From the 2021 Census, 17% of occupied dwellings in Uralla were rented compared with 29% across the region comprising the four municipalities of Armidale, Tamworth, Walcha, and Uralla. Despite this lower proportion of rented dwellings in Uralla, assessing the rental market is crucial for understanding housing affordability, accessibility, and overall market balance within a community. High rental demand, low vacancy rates, and rising rents can signal affordability challenges and highlight gaps in the supply of suitable housing, impacting a broad cross-section of the community, including low-income households, young professionals, and itinerant populations. Limited rental options or high rental costs can affect these demographics' ability to live close to their place of employment, influencing workforce stability and local economic resilience.

Higher prices and rents are often viewed negatively. However, one positive aspect is that such conditions may make Uralla a more attractive prospect for developers and investors. The investor

market is key to delivering smaller-format housing, which is currently lacking in Uralla. Generally speaking, individual households tend to build single detached houses, while developers typically deliver multi-dwelling developments, often on smaller lots or as smaller houses overall—types of housing that are currently absent in Uralla.

The difference in investor interest is reflected in building approvals data. Over the past four years, semi-detached dwellings and flats have constituted 27% of average monthly dwelling approvals across comparable areas. In Uralla, over the same period, the average is just 4%[4] with only two months recording any activity in semi-detached housing.

Data tables for sales and rental data are provided in Appendix B.

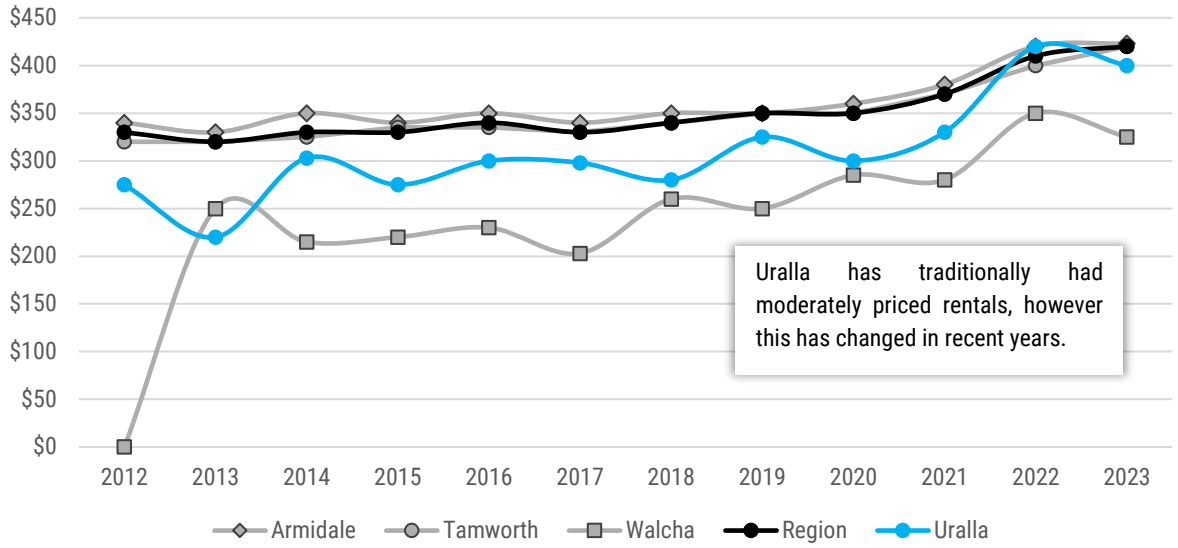


Figure 11 Weekly median rental price for a house (Source: REMPLAN Housing)

5.3 Dwelling Approvals and Completions

Dwelling approvals are considered a leading indicator in terms of housing supply. Approvals provide an early measure of future housing stock and can indicate how well the market is responding to demand. This demand is not just overall population growth, but also population change such as households transition and churn. This is demonstrated in areas such as Uralla and Walcha, where new dwelling approvals are issued even during periods of population decline.

In Uralla over the past decade, new dwelling approvals have ranged between 15 and 33 annually, averaging 24 each year since 2014 (charts and tables for Uralla and surrounding LGAs are available in Appendix B). Notably, the number of new dwelling approvals in Uralla only has moderate variability compared to the other municipalities in the region (Figure 12). Tamworth has the most consistent levels of development activity (as indicated by approvals) which may be expected due to its role as a regional centre and its consistent population growth. After Tamworth, Uralla has the most consistency in terms of new dwelling approvals, with Armidale and Walcha having much more volatility. This level of consistency for a small municipality such as Uralla is indicative of the ongoing demand for new housing despite some periods of absolute contraction in population.

[4] *ABS 2024, Building Approvals by SA2 and above, from July 2021 onwards*. Data is based on SA2 figures; figures reported for Armidale are for the Armidale SA2 while figures reported for Uralla are for the Armidale Surrounds-South SA2.

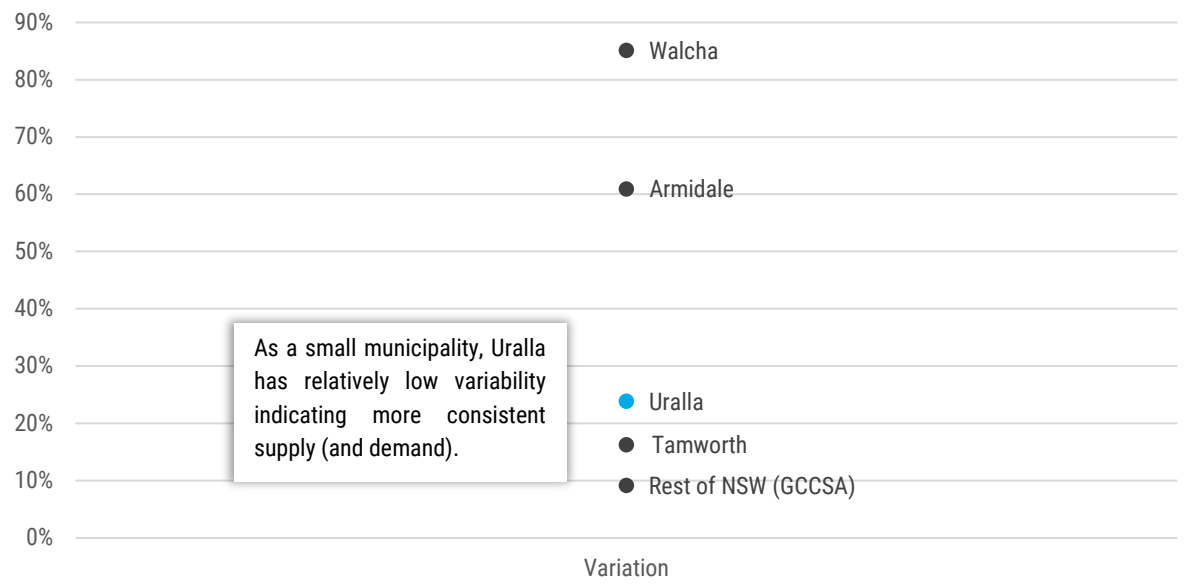


Figure 12 Annual variation in new dwelling approvals by region (measured by relative standard deviation over 10-year period)

There are natural delays between dwelling approvals and the delivery of a completed house. For a standard detached dwelling, construction can be from six to 12 months. In addition to construction timeframes, some approvals may be more substantially delayed or not commence at all. In New South Wales, around 90% of approvals translate into a completed dwelling, with a degree of variation in any given year as some years are periods of 'catchup' and vice-versa.

With the exception of Armidale, approvals in the region have been declining in recent years while the number of completions has been increasing. In Uralla between the 2022 and 2024 financial years there have been 58 dwelling approvals[5] and 52 completions[6]. The locations of these completions are primarily in the Uralla township, with some around the Tobruk Road area of Invergowrie (see map in Figure 13).

Although development is relatively consistent, the number of new dwellings being constructed remains low. While this is typical for a small town and not inherently problematic, the limited volume of new housing makes it more challenging to transition the housing supply to better meet the needs of the future population. This reliance on older dwelling stock may pose issues, particularly in terms of accessibility, energy efficiency, and suitability for an ageing population. The state of existing housing stock relative to the household profile is explored in more detail in section 5.4 as well as section 6.

[5] ABS Building Approvals, Australia
[6] State Government of NSW and NSW Department of Planning, Housing and Infrastructure 2021 (online OC Data API)

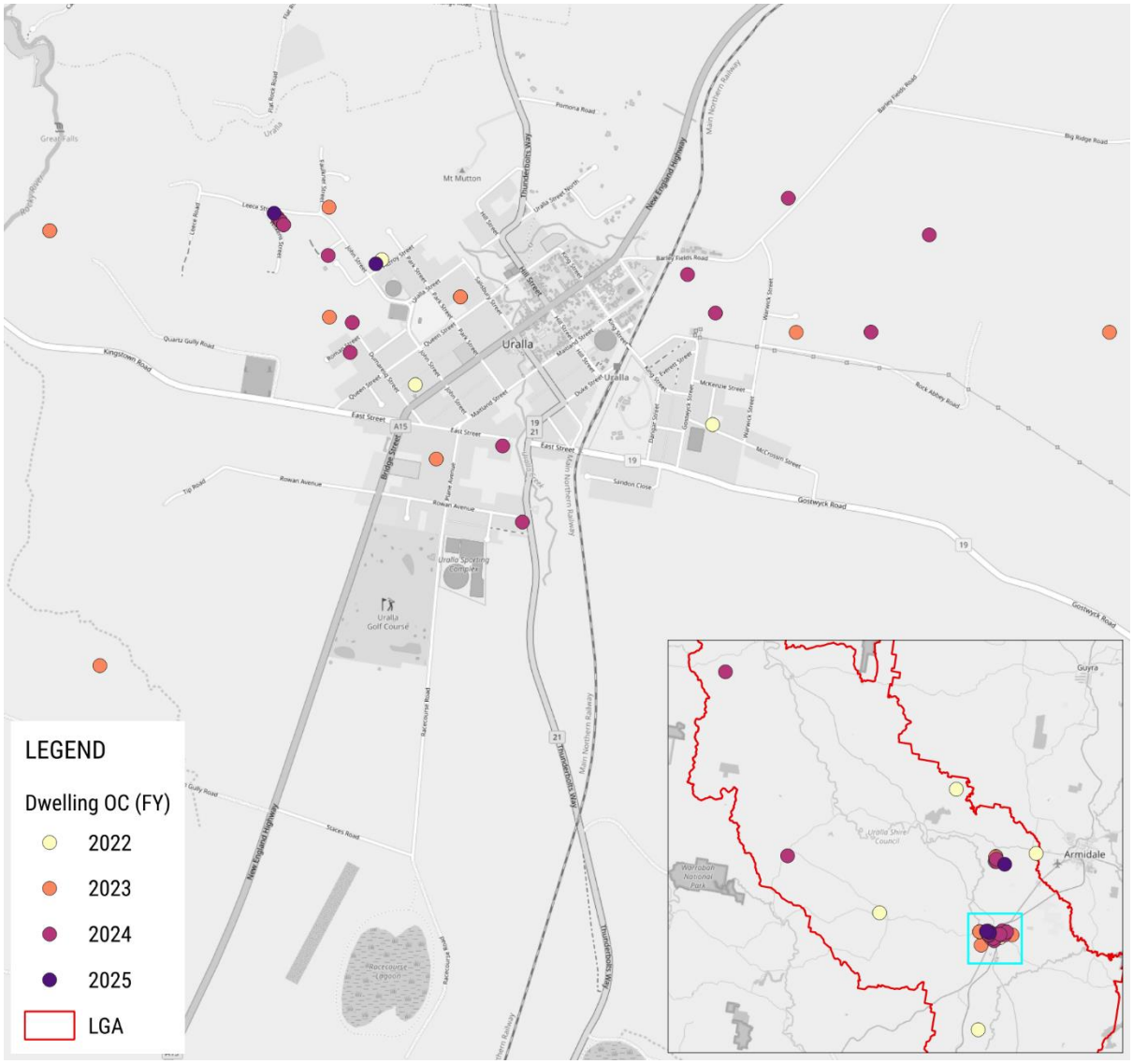


Figure 13 New dwelling occupation certificates by financial year (2025 is year to date) (Source: State Government of NSW and NSW Department of Planning, Housing and Infrastructure 2021)

5.4 Housing and household characteristics

Housing and household characteristics are important in understanding the diversity of housing needs within a community and how well dwelling stock matches these needs. Considering factors like dwelling structure, number of bedrooms, and people per dwelling provides an understanding of the current (and past) profile. When considered in the context of future demand, this assists in developing appropriate responses to help ensure that housing supply better matches demand in terms of both quantity and type.

Understanding existing housing stock is particularly important for Uralla where new dwelling development has been, and will likely continue to be, relatively low (Figure 14). As a result, changes in the housing profile can be slow. There are several important considerations from this condition of slow change:

1- Most of the housing that is to service the population over the coming decades already exists.
2- Existing housing was built many decades ago when the demographic profile of the population and the market conditions that influenced supply were drastically different to today.

3- It is important to facilitate housing that the community needs as opposed to what the market will deliver.

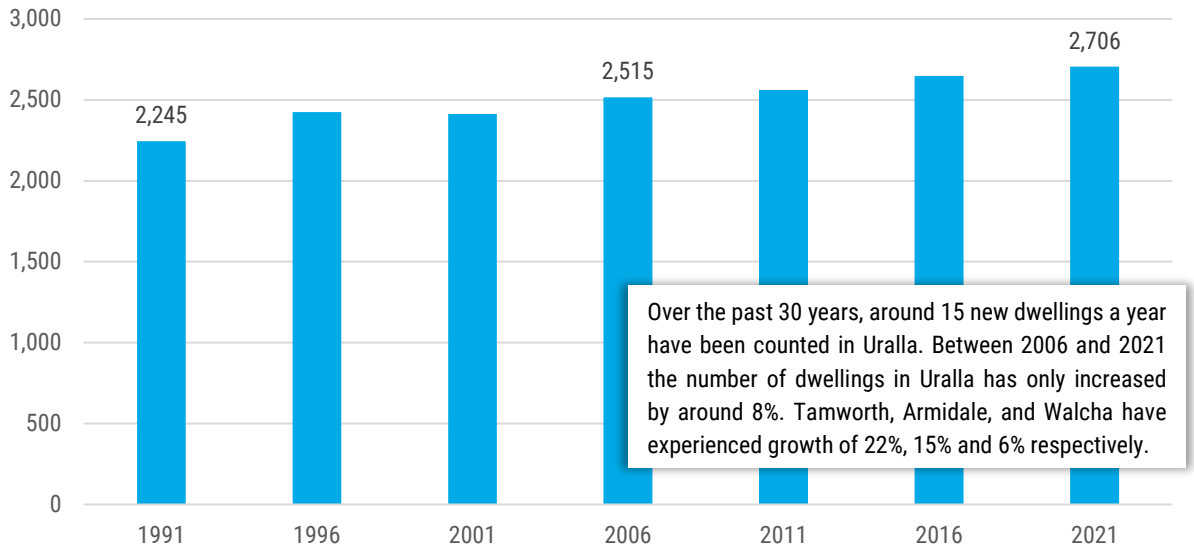


Figure 14 Count of dwellings in Uralla Shire (Source: REMPLAN Community)
Note: Counts exclude dwellings in caravans, cabins and improvised homes.

Housing type and number of bedrooms

The characteristics of housing in Uralla Shire is typical of rural areas, with separate houses accounting for the overwhelming majority of dwellings. Separate detached houses have consistently accounted for around 95% of all dwellings in the Shire since 2006, but that share has increased from decades prior when they only accounted for around 93%.

Dwellings in Uralla Shire are typically three or four bedrooms, accounting for almost 1,700 of total dwellings in 2021. The main growth has been in dwellings with more bedrooms (four bedrooms followed by five bedrooms), a common occurrence in many regional areas where single detached dwellings remain the most common form of housing. One-bedroom dwellings are significantly underrepresented in Uralla Shire, and the number of 2-bedroom dwellings has actually declined (Figure 15).

As outlined in Section 5.2 this outcome is likely due to new dwellings being constructed by households, as opposed to developers. Increasing investor interest in Uralla to deliver forms of market housing will be important to increase dwelling diversity. Council, the State Government, and non-government organisations will play a role in delivering diverse forms of non-market housing.

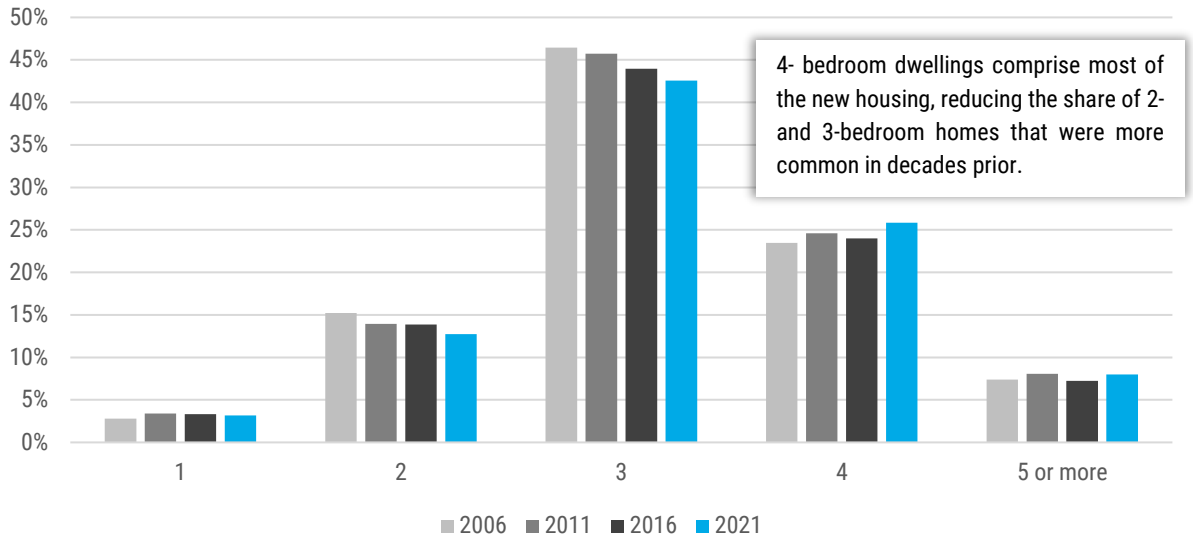


Figure 15 Dwellings by number of bedrooms in Uralla Shire 2011-2021 (Source: REMPLAN Community)
Note: Excludes bedsits and 'not stated' responses

Persons per dwelling

Household composition has been changing in Uralla Shire. While housing has been tending towards larger dwellings with more bedrooms, household size has been moving in the opposite direction, with a noted shift towards one and two person households and a shift away from larger households of four, five, and six people. In 2021 one- and two-person households accounted for two-thirds (67%) of all households.

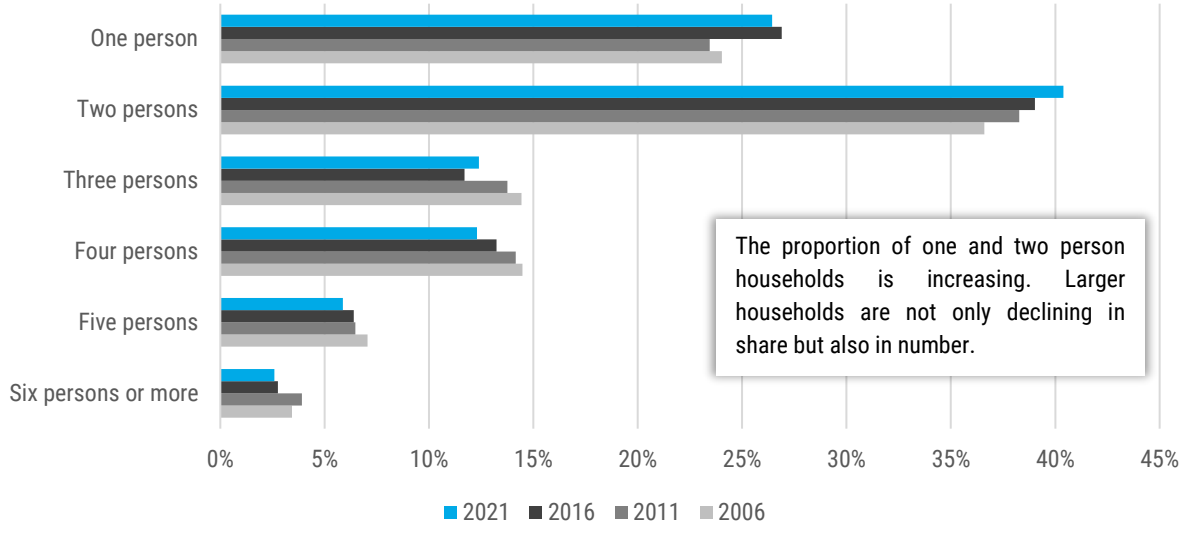


Figure 16 Persons per dwelling 2006-2021 (Source: REMPLAN Community)

Mismatched housing sizes

Housing is becoming less suited the household profile in Uralla Shire. This is evident through the disconnect between the number of bedrooms per household (typically three to four bedrooms) and the

number of residents per household (dominated by two-person households, with significant numbers of one-, three- and four-person households). The large number of households with spare bedrooms suggests there is an underutilisation of existing housing in the Shire (Figure 17).

While determining the number of spare bedrooms is useful for understanding the carrying capacity and potential underutilisation of dwelling stock, it does not fully account for other lifestyle factors and household choices. Many households desire or require spare bedrooms for a variety of reasons. For instance, space for a home office has become increasingly important since the pandemic, but spare rooms can also be used for hobbies or home businesses. Empty nesters often want extra space for family visits, even if these occur only once or twice a year.

For some households, spare rooms may indeed represent underutilisation. For renters, this could mean paying higher rents than necessary. Larger homes than needed can also result in higher running costs and increased time spent on maintenance and upkeep.

Ultimately, trying to align the number of people with the number of bedrooms in a house is neither realistic nor useful. Instead, the focus should be on providing a diversity of housing options, allowing households to find the best fit for their needs throughout various life stages.

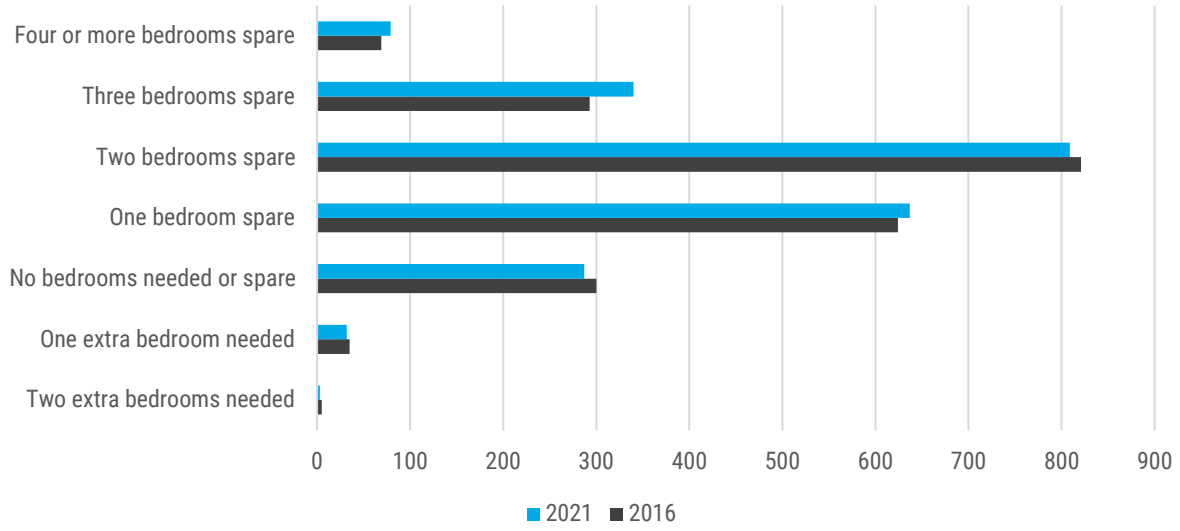


Figure 17 Dwellings by number of spare bedrooms in Uralla Shire 2011-2021 (Source: REMPLAN Community)

Household income

The *State Environmental Planning Policy (Housing) 2021* defines very low, low, and moderate income households based on where a household is located in the State, either in Sydney or the rest of New South Wales[7]. In 2021, the median household income for New South Wales was $1,829 per week. Households on very low incomes are therefore earning less than $915 a week.

Household income is determined by several factors including geographic location, family structure and size, occupation and education, investment levels, amongst others. These factors interact in complex

[7] For areas outside of Sydney, households on a very low income earn less than 50% of the median household income, low income households earn between 50% and 80% of the median household income, and moderate income households earn between 80% and 120% of the median.

ways, influencing not only the amount but also the stability and growth potential of household income over time.

In 2021, all LGAs in the region had a high representation of very low income earning households compared to New South Wales where 27% of households were within the very low income range. In Uralla, more than half of all households were either on low or very low incomes, the second highest behind Walcha.

This high proportion of lower income households can have implications for housing affordability, can increase demand for social and affordable housing, and creates a risk of housing insecurity amongst other factors. To mitigate these potential issues, there is typically a need for more flexible housing typologies. However, the private sector can sometimes be less incentivised to develop the necessary forms of housing, resulting in more uniform housing development which lacks diversity in housing type.

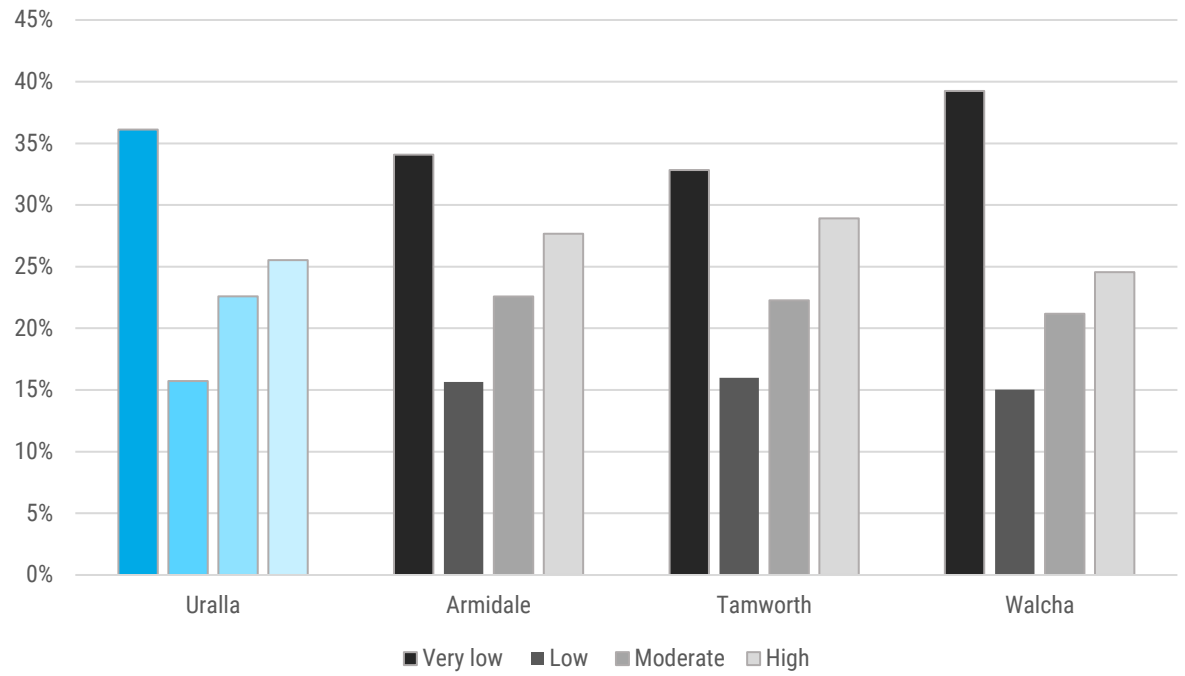


Figure 18 Household income, 2021 (Source: REMPLAN Community)

5.5 Affordability

The term 'housing affordability' refers to the relationship between expenditure on housing (prices, mortgage payments or rents) and household incomes. The concept of housing affordability is different to the concept of 'affordable housing' which refers to a spectrum of housing delivery models that focus on providing housing at financially sustainable costs to tenants or purchasers.

Measures of affordability in this report is based on the actual cost of being able to rent or buy a home compared to median household incomes for regional New South Wales. It is not a measure of what individual households are actually paying (which refers to levels of stress). The measure of affordability applied here recognises that housing markets operate regionally and provides relative affordability of housing in different areas for a household who may be looking to purchase or rent a home. The measure applies the 30% of household income principle, where the price of housing is less than 30% of the median household income[8] it is considered to be affordable.

Purchase Affordability

House purchase affordability has been significantly impacted across the region over the last five years. Prior to 2020, Uralla specifically had a high proportion of dwellings being sold that would be considered affordable. However, over recent years affordability in Uralla has declined to the point where in 2023 it had the lowest proportion of houses being sold that could be considered affordable. Walcha's house purchase affordability remains the highest in the region at 38.5%, but this is down from a 2019 high of 91% (Figure 19).

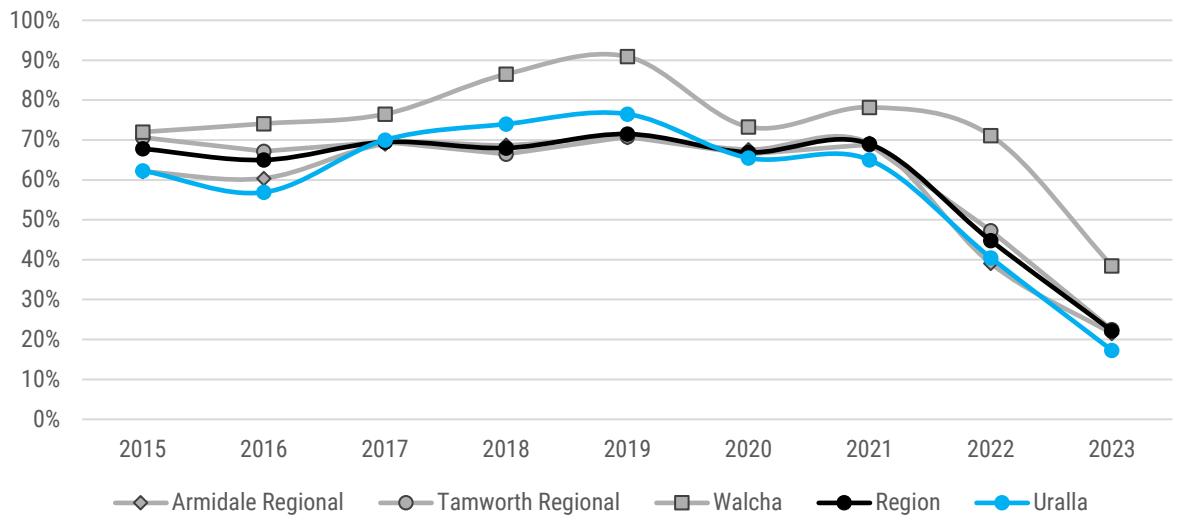


Figure 19 Affordable houses sold in Uralla Region (Source: REMPLAN Housing)

Rentals

Similar to housing ownership, rental affordability in Uralla has been declining over the years. Once the most affordable municipality in the region, rental affordability in Uralla is now lower than the regional

[8] The median household income comes from the ABS Census 2016 and 2021 for the Rest of New South Wales GCCSA. Wage Price Index (WPI) data is applied to this baseline for the intervening and subsequent years.

average. Since 2020, more than 40 rental properties have been listed annually in Uralla. This number remained consistent through to 2022; however, the proportion of affordable rentals dropped significantly in 2022, coinciding with the construction of the New England Solar Farm. Affordability improved again in 2023, with the total number of listings also increasing substantially (67 listings in 2023 compared to 44 in 2022).

These changes in both the number of rental listings and rental affordability, particularly through the period of construction of the solar farm, is indicative of the impact that such projects can have on the market. Managing such demand peaks is important to manage supply strains, support economic stability, and demonstrates the need for long-term planning.

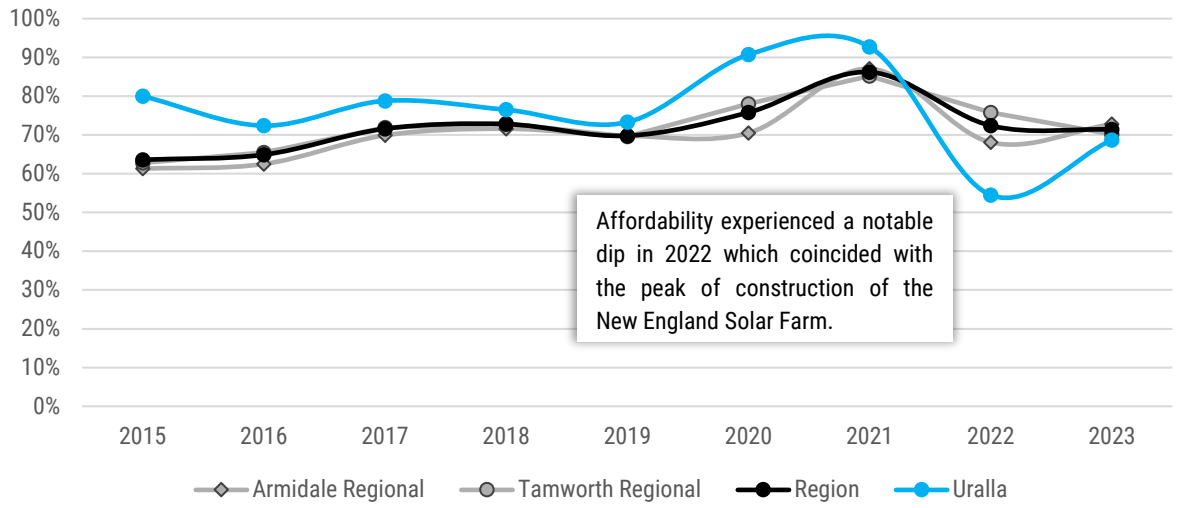


Figure 20 Affordable rentals in Uralla Region (Source: REMPLAN Housing)
Note: Walcha had a maximum of six rentals listed through the analysis period so has been excluded from the analysis.

6 Population

Key takeaways

Ageing population and more retirees

Uralla has experienced significant population ageing, with retirees aged 65 and above representing the fastest growing population group in Uralla.

Shrinking number of working age residents

The reducing number of working age residents is a threat to economic activity and may reduce the amount and reliability of goods and services that are provided locally in Uralla.

Temporary demand from REZ projects

The New England REZ projects are forecasted to bring a significant population boost to Uralla, but most of this growth will be lost after the construction phase of the REZ projects. While this is sustained over several years, the spike is concentrated over a few years leading into 2031. The required operational workers will bring some growth, though a proportion of these workers will continue to operate on a FIFO (fly-in, fly-out) or DIDO (drive-in, drive-out) basis.

Temporary housing needs could transition to longer term benefit

The influx of temporary workers due to the REZ projects will exceed Uralla's existing housing capacity. Council collaboration with project proponents is advised to establish mechanisms for temporary housing solutions that could benefit the community long-term.

Climate influence on population

Historical booms and busts of population in Uralla Shire are dependent on climatic conditions and extreme weather events in Uralla and in nearby regions. Generally, population has been higher during times of high rainfall and lower during times of drought, and there is recent anecdotal evidence that Uralla is becoming a preferred relocation destination for residents of low lying, flood-affected areas like Lismore.

6.1 Overview

Population change is the underlying driver of housing demand. It is not only the number of people that influence housing demand, but also the structure and characteristics of a population which are considerations when planning for housing in a given region.

After experiencing a slowly declining, ageing population, Uralla may experience a scenario of significant population pressure from the temporary workers required to construct, operate and maintain the renewable energy projects in the New England REZ.

REMPLAN's internal Forecast team has utilised top-down and bottom-up approaches driven by data and insights provided at the local level to develop the forecasts for Uralla. This approach ensures that local inputs and contextual knowledge of events and projects that will affect the projected population – such as the rollout of the New England REZ - are incorporated into forecasts.

6.2 Historic Population

The ageing population profile and declining birth rate are significant structural changes that exist in areas across Australia. As a result, the influence of natural change on population growth is steadily declining and in many areas is already negative. Major changes in Australia's population, and the population of respective regions, is now fundamentally about migration.

Major cities and larger centres often develop a critical mass, creating a gravitational effect that fuels a cycle of population growth, investment attraction, and service provision. These urban areas have typically experienced a relatively consistent positive growth trajectory over many years. Tamworth is one such example, which has been consistently growing at around 1% per year.

In contrast, regional and rural areas can experience different population dynamics. Population changes in smaller centres, such as Uralla, are often more volatile, experiencing periods of growth, stability, and decline. These fluctuations are typically tied to the fortunes of the region's economic base. For instance, during periods of drought, agricultural production is significantly impacted, which negatively affects local supporting industries and can result in an exodus from rural areas and their service centres.

However, other macro influences can positively impact migration patterns in regional and rural areas, such as remote working trends, lifestyle migration, and lower housing costs.

Population change in Uralla over the past 20 years has been varied, with the municipality experiencing periods of strong growth, stability, and decline. Since 2013, Uralla has been going through an extended period of gradual population contraction. However, this trend slowed in 2022 and reversed in 2023 (Figure 21). Various factors likely contribute to this reversal, including the relative affordability of housing, accessibility to major centres, major projects occurring in the region, and ongoing lifestyle migration.

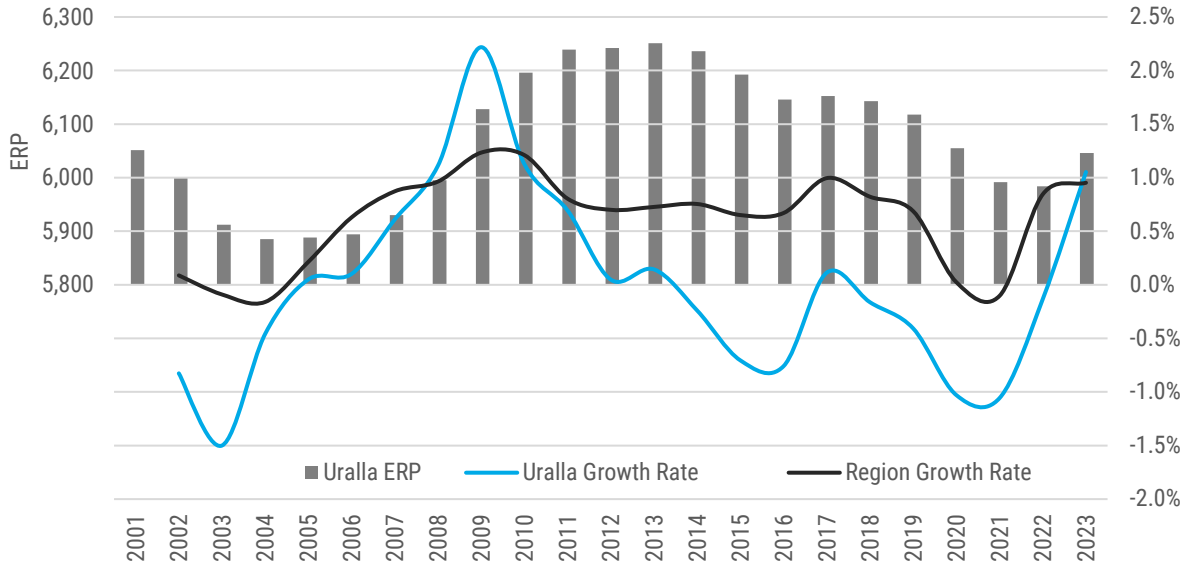


Figure 21 Uralla Estimated Residential Population and regional growth rate (Source: ABS Regional Population)

While the overall population in Uralla has been somewhat volatile, there have been more consistent trends in the changing age profile. The chart in Figure 22 illustrates the proportion of the total resident

population across certain life stages over the past two decades. The chart demonstrates significant changes, particularly in the growth of 'Retirement age' cohort and accompanying decline in the 'Family formers' cohort as a proportion of the total population. This shifting age profile has implications for housing as this typically results in decreasing household sizes but also a need for accessible and low maintenance dwellings.

This is not necessarily unique to Uralla, with almost all regional areas experiencing similar changes to varying degrees. Walcha, for example, has experienced greater increases in the proportion of older cohorts and larger declines in younger cohorts but the broad trend is similar to the experience in Uralla.

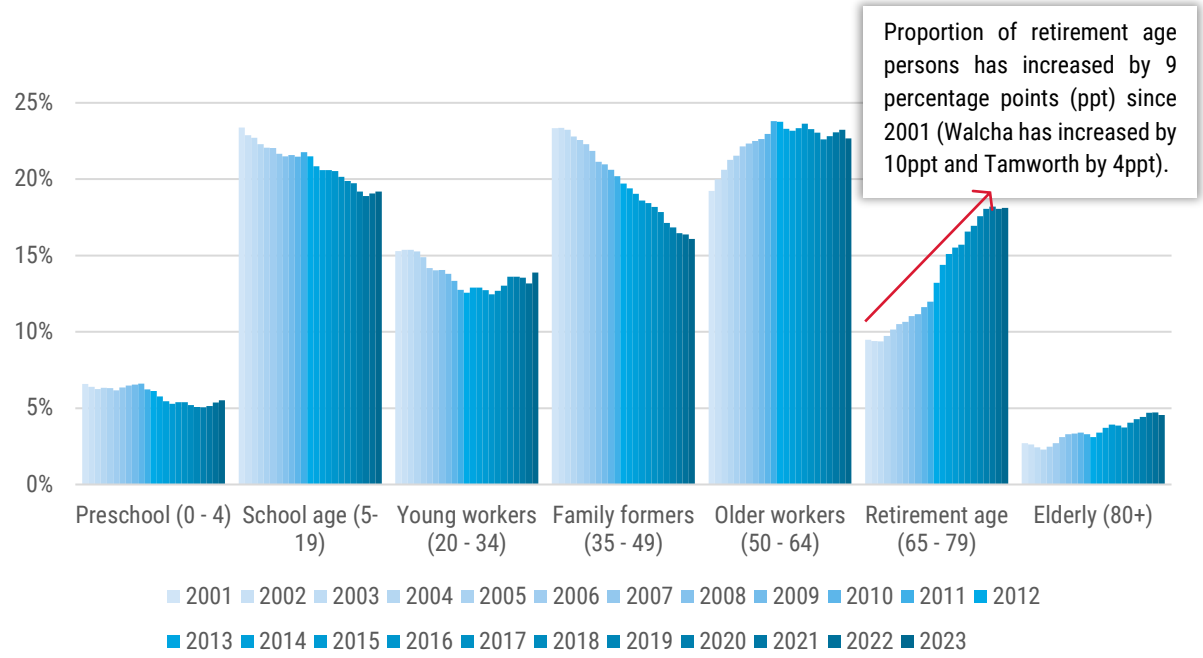


Figure 22 Uralla population profile by life stage, 2001-2023 (Source: ABS Regional Population)

The primary driver of population change in Uralla, and most regions in Australia, is migration. The influence of natural change (i.e. births less deaths) has been steadily declining as a result of the ageing population and lower fertility rates. As the chart in Figure 23 illustrates, natural change in Uralla has been hovering around zero for close to a decade.

The declining influence of lower fertility rates on natural change has been relatively consistent. By contrast, migration fluctuates and is now having the largest impact on the population changes being experienced in Uralla. As mentioned in section 6.2 above, as a primarily agricultural economy the prevailing climatic conditions has a notable influence on patterns of migration. Comparing peaks and troughs in migration with periods of drought demonstrate the correlation between these factors (Figure 23 and drought charts included at the end of Appendix C).

Encouraging migration to Uralla will be crucial in coming years, not only to stabilise and grow the population, but also provide workers, contribute to community vitality and sustain services such as schools and health services. Diversifying the economy will also be important to help stabilise population movements and support more consistent levels of demand that are usually easier to manage and plan for.

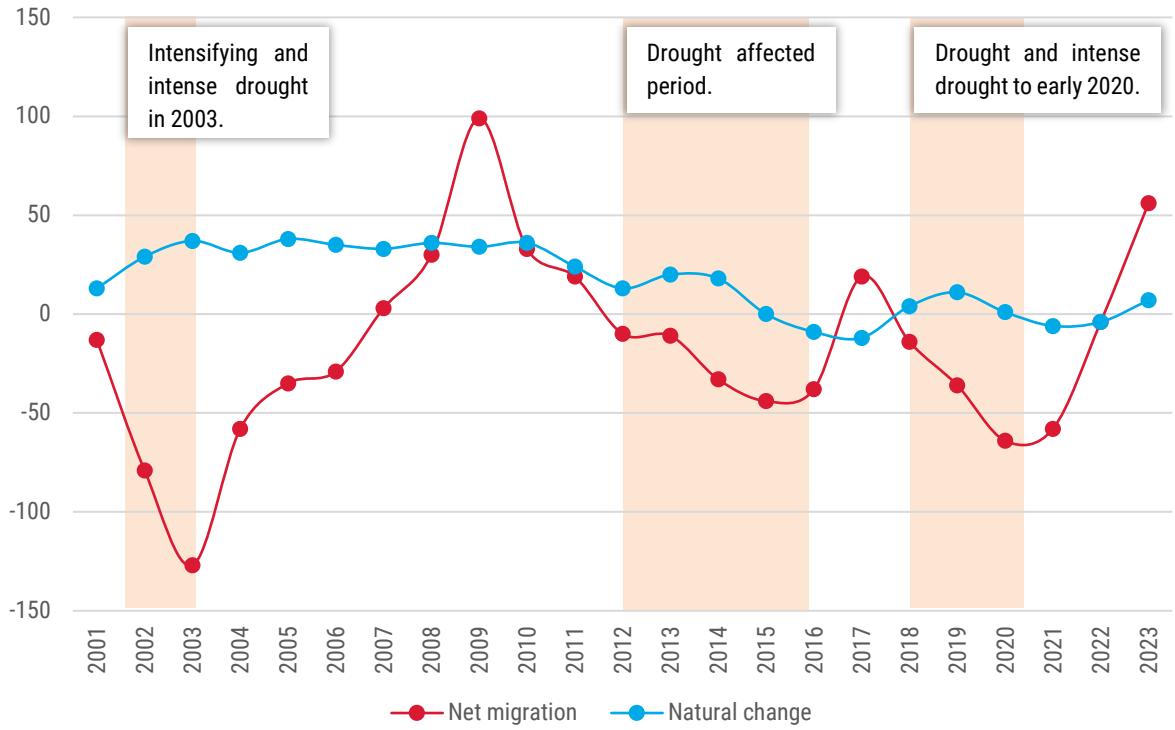


Figure 23 Uralla Shire components of population change (Source: ABS)

6.3 Base Case Population Forecasts

Uralla's population had been in decline between 2013 and 2023, after which it increased, and it is now at its highest point since 2008. The State Government Department of Planning provide the official population projections for local government areas across the state.

The most recent projections provided by the department, published in 2022, use the 2020 Estimated Residential Population (ERP) as the base year. A number of significant events have occurred since the publication of the 2020 ERP figures, being:

- COVID pandemic which saw significant changes in population and migration patterns.
- 2021 Census was completed and released.
- Intercensal amendments to the official ERP figures using the 2021 Census data.

Given these notable changes have not been accounted for in the official projections, REMPLAN has undertaken an independent set of population and housing forecasts for small areas within Uralla Shire using the latest data available. The methodology of REMPLAN's forecasts is outlined in more detail in Appendix D.

A comparison between the Department's 2022 projections and REMPLAN's forecasts which apply the latest population and dwelling activity statistics is illustrated in Figure 24. As indicated in the chart, official projections have Uralla's population declining well below long term levels. REMPLAN's forecasts have population relatively stable, increasing slightly over time. This slight increase is largely due to more recently observed local trends in migration, building approvals, as well as considerations around macro migration factors affecting small attractive rural centres that are proximate to major regional centres (such as cultural/lifestyle shifts, government incentives for decentralisation, access to services, etc).

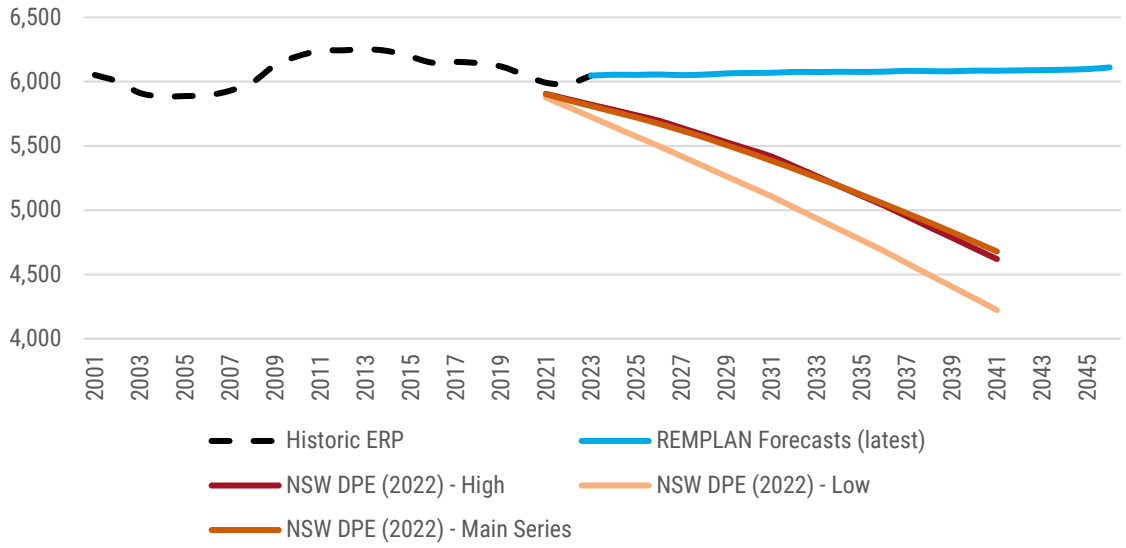


Figure 24 Population projections Uralla Shire (Source: REMPLAN Forecast, NSW Department of Planning)

Small area forecasts have been completed for three sub-geographies of Uralla Shire; the Uralla Township, Invergowrie-Saumarez Ponds, and a Uralla Balance region. Areas are illustrated in the map in (Figure 25) with more detailed maps relative to land use zones provided in Appendix E. Results for these small areas are combined to create the outlook for the Uralla LGA.

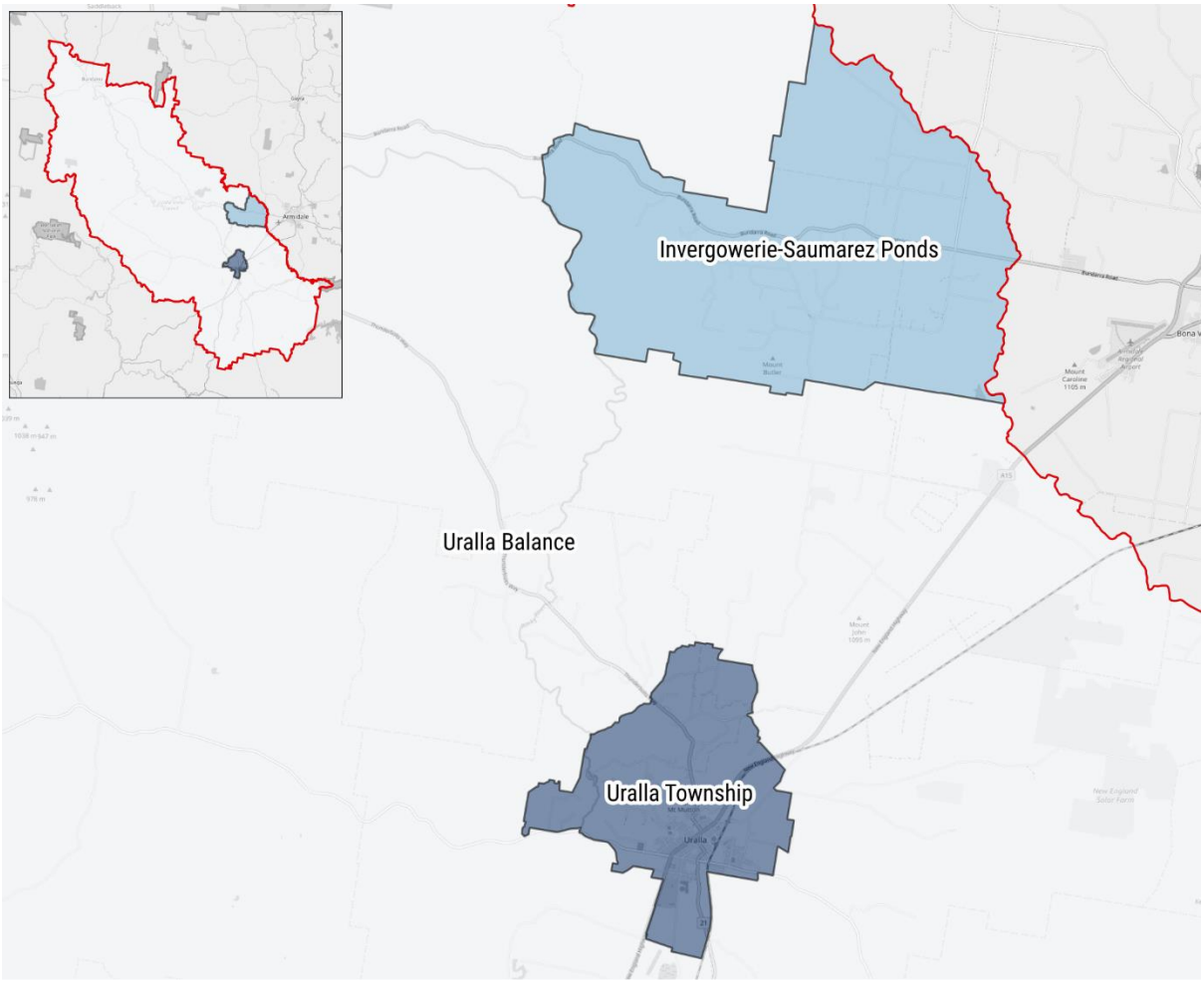


Figure 25 Uralla small area forecast regions

Across the three areas, the Uralla Township and Invergowrie-Saumarez Ponds are forecast to experience slight growth in population across the forecast period, which extends out to 2046, while the Uralla Balance region is forecast to contract. The overall population change is relatively minor, however more notable are the components of change and shifting demographics across the regions.

The Uralla Township is, and will continue to be, the largest population centre, accounting for around 45% of the Shire's population. The Uralla Township is forecast to attract the highest net number of new residents (i.e. net migration), however, due to the older age profile of residents, the influence of natural change will be negative. This contrasts with the Invergowrie-Saumarez Ponds which has the youngest age profile and maintains a positive influence of natural change over the forecast period.

The charts of net migration and natural change (provided in Figure 26 and Figure 27) illustrate the major influences of population change in the small areas of Uralla Shire. In short, Uralla Township's population is dependent on migration, and due to the population profile, the impact of natural change is negative.

While still ageing, the rural areas of the Shire have higher proportions of family households than Uralla Township. This sees natural change in these rural areas being the driver of population growth while net migration is negative. As these areas have very few new dwellings being built, the underlying capacity does not change and therefore population growth is dependent on transition or churn of larger households moving into dwellings previously occupied by smaller households.

These patterns of population movement outlined above are relatively common and provide an initial insight into the population profile and housing characteristics that are required to service certain

populations. This is further examined in relation to household formation and its impact on dwelling demand below.

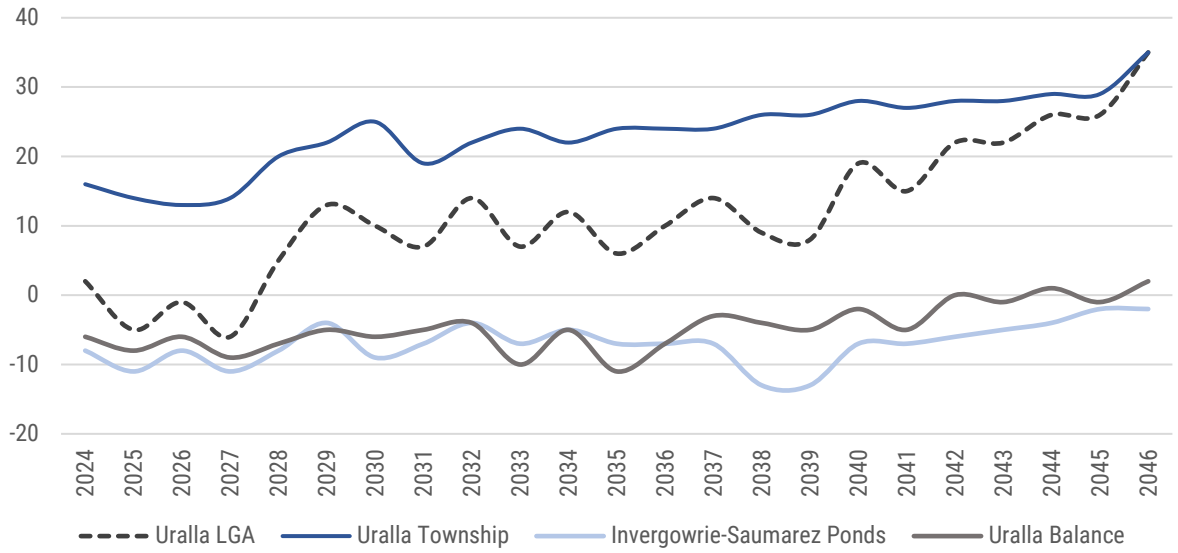


Figure 26 Net migration (Source: REMPLAN Forecast)

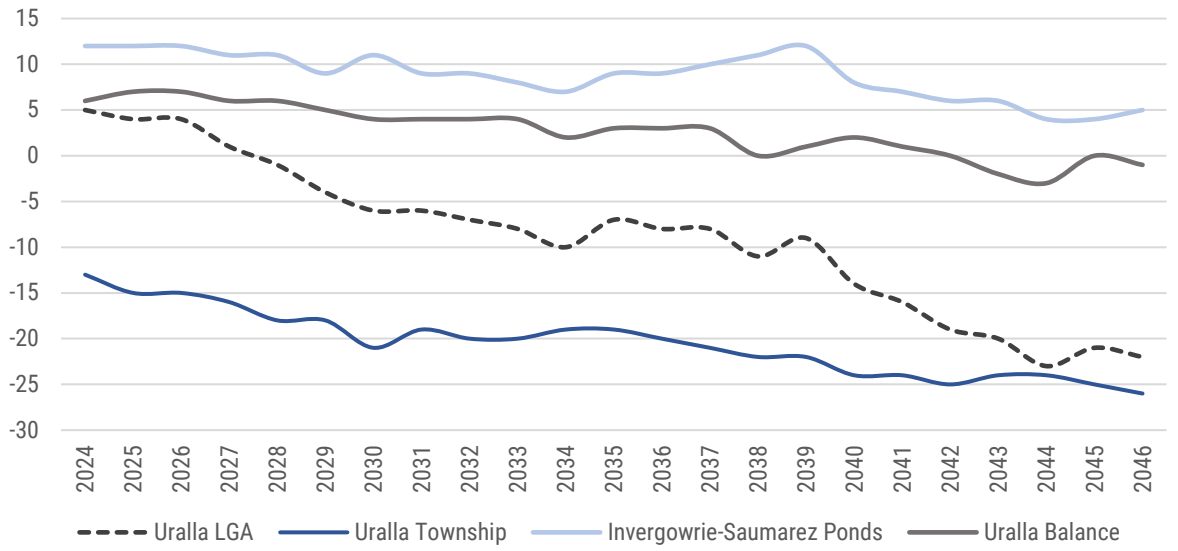


Figure 27 Natural change (Source: REMPLAN Forecast)

At a high level, the median age of each of the forecast regions is an indicator of the underlying age profile, but also how rapidly that age profile is changing. The chart in Figure 28 demonstrates the current and forecast median age for each forecast area. Uralla Township has a median age of 46, but due to the increasing proportion of older residents (through in-migration of older age groups and out-migration of younger cohorts), the township area is expected to see the largest increase in median age over the forecast period. Invergowrie-Saumarez Ponds has the same median age as Uralla Township in 2023 but does not age as much through the forecast period due to the higher prevalence of households in the family forming stage of life.

At a shire-wide level, the age profile (Figure 29) clearly demonstrates the increase in median age. While the detailed age profile varies across the smaller regions, there is a clear trend to an increase in older cohorts. The rural areas of Invergowrie-Saumarez Ponds and the balance area have somewhat flatter (or slower) declines in younger cohorts as these areas are anticipated to experience levels of churn with new families.

Data tables for each forecast area by age and life stage is provided in Appendix F.

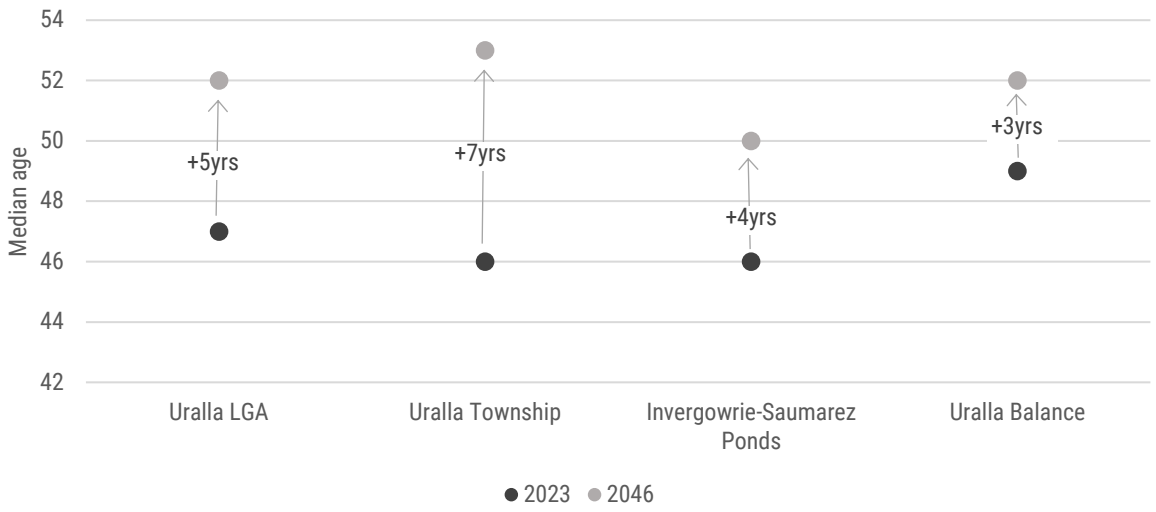


Figure 28 Median age in 2023 vs 2046 forecast

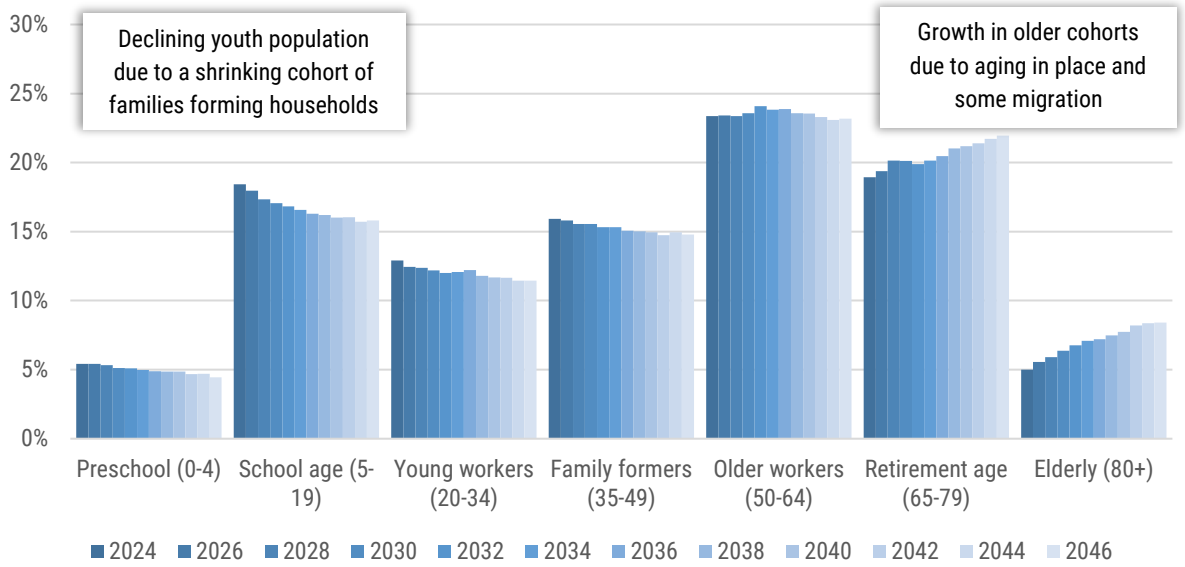


Figure 29 Uralla Shire forecast population age profile (Source: REMPLAN Forecast)

The age of a population has a significant influence on household composition. While there are always exceptions in individual households, there are broad patterns regarding how people form households through various life stages. Young adults who have left the family home will tend to live in smaller households either as a single person or in shared accommodations. Small one- or two-bedroom

dwellings are often sought after in this life stage. Where costs of living are high, such as they are now, there are increasing tendencies to remain in the family home for longer periods.

Australians in general are having fewer children and having children later in life. As a result, the child-rearing life stage is older than in previous generations and often begins in the mid to late 30s. Younger couples may form a household (colloquially known as 'dual income no kids' or DINKs). During this stage, housing needs tend to be for smaller dwellings. However, as couples or individuals plan for families, there is often a preference for larger dwellings to accommodate a growing family. Standard detached dwellings or larger townhouses are typically preferred.

As children leave home, household size shrinks again, with empty nesters typically returning to single or couple households. This phase of life can often be an extended period, where the smaller household continues to occupy the large family home. There are numerous reasons why this occurs, from emotional attachment and financial considerations to social ties, desire for space, lack of alternate housing options, and many more.

As people progress into their elderly years, there is a very high proportion of single-person households. Some may be in multi-generational households or even reform into group households; however, lone-person households are the most common until individuals transition into care arrangements.

The table in Appendix G illustrates these broad age-based household formations through the Census data. In general terms, the population profile of Uralla is already leaning towards smaller one- and two-person households, and this is set to increase.

The aging profile and propensities to form smaller households results in a decrease in the average number of persons per dwelling. Persons per dwelling is a common metric in housing and demographic analysis. It does not capture the nuances of household diversity (as outlined above and provided in detail in Appendix F) nor housing suitability as discussed in Section 5.4. Care should be taken as it is can be an oversimplification of diverse housing needs. However, when considered in the context of other characteristics it is a useful summary statistic that is used as a general indicator of housing demand and broad trends in household size.

The chart in Figure 30 illustrates the forecast number of persons per dwelling across the various regions in Uralla Shire. With the oldest population profile, Uralla Township is expected to continue to have the smallest average number of people per dwelling, at 2.24 in 2024, reducing to 2.04 by 2046. Invergowrie-Saumarez Ponds, which is more popular with larger households and families with children, has the highest number at 2.56. However, over the forecast period, this is also expected to contract to around 2.23 by 2046.

In essence, a contracting household size means that more dwellings are required to house the same number of people. If Uralla Shire maintains its current population levels, additional housing will still be required. Given the changing profile of the population and the current characteristics of the housing stock, it will be increasingly important to actively facilitate more diverse forms of housing.

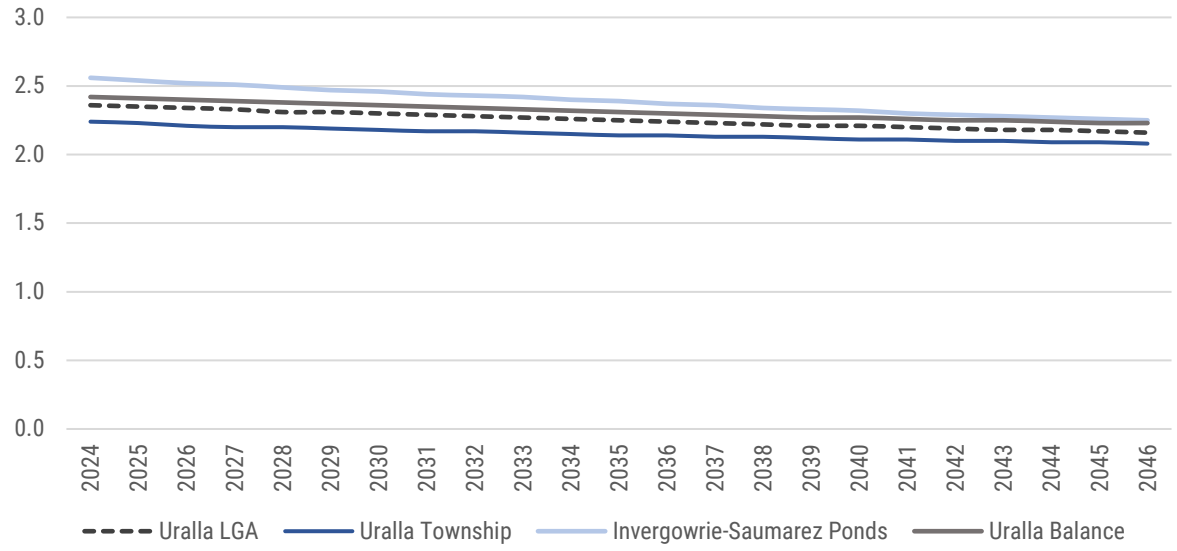


Figure 30 Forecast average persons per dwelling (Source: REMPLAN Forecast)

Characteristics of the population and their propensity to form into various types of households ultimately influences dwelling demand. Dwelling demand determined through this project accounts for a range of factors, such as demand from unoccupied dwellings (i.e. dwellings used for short stay or temporary occupation), household transitions, dwelling churn (i.e. lone person households moving out and larger family households moving in). Dwelling figures illustrated in Figure 31 suggest an average annual demand across the LGA of 12 new dwellings.

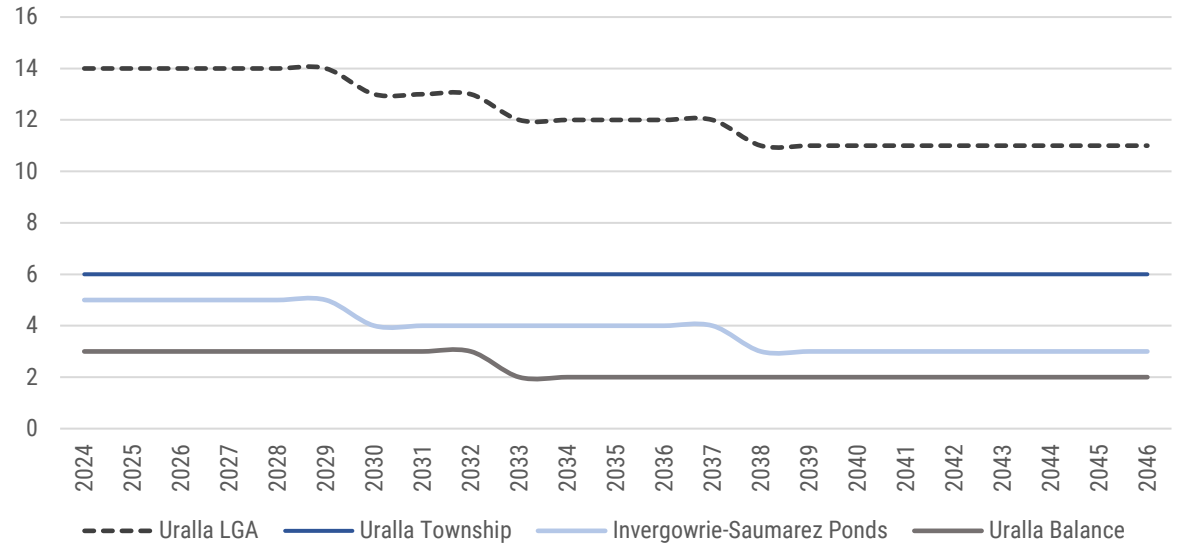


Figure 31 Forecast annual dwelling demand (Source: REMPLAN Forecast)

6.4 Population Growth Scenario

In addition to a 'base case' scenario illustrated in Figure 24 above, the project has also developed a 'growth scenario'. This growth scenario accounts for the significant increase in temporary—and in some

cases, permanent—workers attracted to the region due to the REZ projects. As outlined in Section 3, these projects will inject an unprecedented level of demand for housing and related population services across the region.

The demographic forecast in the growth scenario projects the future population, household structure, and number of dwellings in Uralla Shire, considering the potential demand impact from the New England REZ projects. This scenario shows a marked spike in population starting in 2027 as various projects come online (Figure 32).

Under the growth scenario, the majority of workers are temporary and are therefore not directly incorporated in the population forecasts (increased temporary worker population is outlined in more detail below). However, a portion of these workers may live in the region if only for a year or more during the construction phase, which will span several years, and some may choose to remain. After project completion, some workers will likely transition to permanent roles to manage and maintain the facilities. This incoming population is largely working-age, with many in the family forming stage who would bring partners and children. Consequently, the growth scenario leads to not only a larger population but also a different demographic structure with a slightly higher growth rate. This new 'permanent resident' workforce and their families is illustrated in Figure 32.

The outcome of the growth scenario is increased demand for dwellings. The chart in Figure 33 illustrates the difference in annual (not cumulative) demand between the base forecast and the growth scenario. As expected, there is a peak in demand during periods of higher population growth. However, the additional dwelling demand is lower than anticipated, due to the utilisation of unoccupied dwellings. Almost all regions have a stock of unoccupied dwellings, which remains stable relative to occupied dwellings under normal conditions. During periods of unusually high demand, however, unoccupied dwellings are often converted to occupied status. This trend was widely observed in many regional areas during the COVID pandemic, as population increases were absorbed by the latent capacity in the existing housing stock.

Detail on the assumptions of the growth scenario is outlined below along with additional demand from non-resident workers.

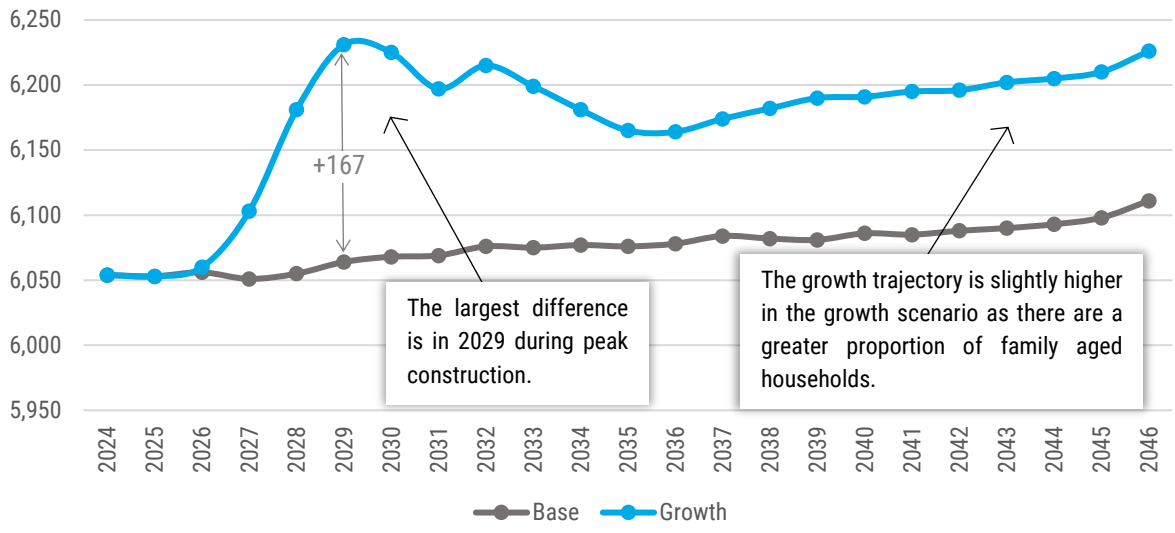


Figure 32 Base population forecast vs growth scenario, Uralla LGA

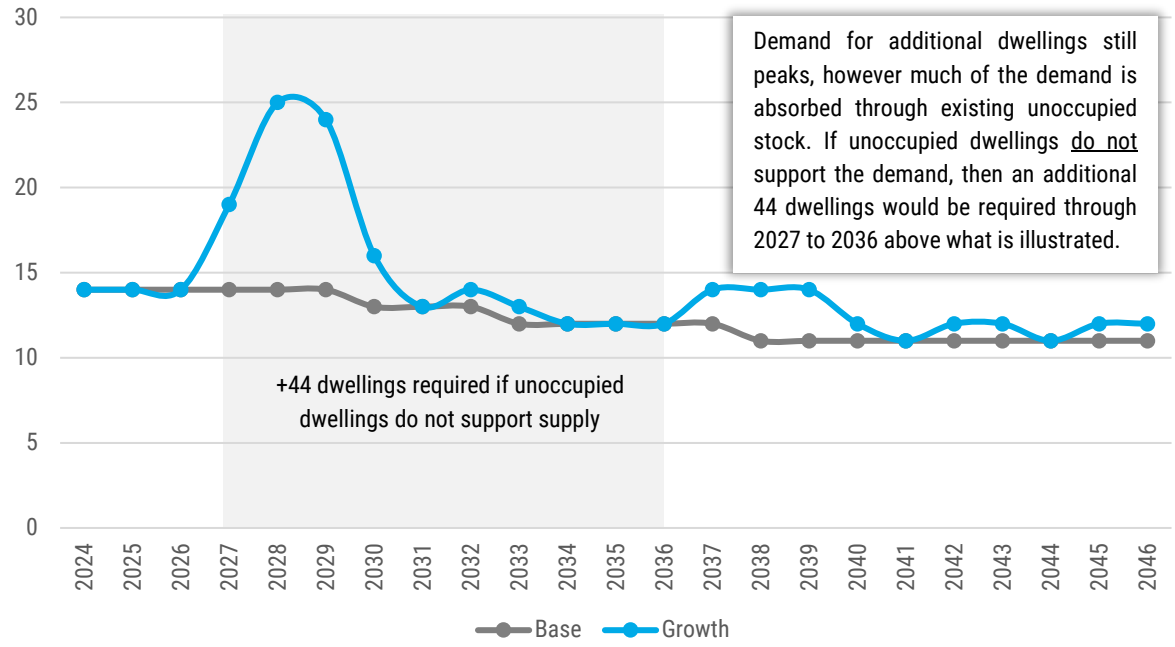


Figure 33 Base dwelling demand forecast vs growth scenario

REZ Project Growth Scenario

The REZ will host a range of projects, including major public investments in transmission capacity and numerous privately-led projects for generation and storage. There is inherent uncertainty regarding the timing of many projects, particularly as many are still in the planning phase and seeking approval. The growth scenario has been developed based on several assumptions to create a reasonable estimate of construction timelines and resulting worker demand. These assumptions are informed by direct engagement with project proponents and a detailed review of actual renewable energy projects that have already been approved and developed.

The main assumptions used in developing the growth scenario and basis for the assumptions are listed in Table 3. The list of projects and input timeframes are provided in Appendix H.

Table 3 Growth scenario assumptions

Assumption	Basis for assumption
The EnergyCo transmission project will require a peak of 600 workers in Uralla and will be completed by 2031.	Based on ongoing discussions between Council and EnergyCo.
Only projects within a designated 45-minute travel time of Uralla township are included in the analysis.	Engagement with EnergyCo and project proponents stating limitations on travel time for construction workers.
Proportion of workforce demand captured in Uralla is based on proximity of the project to Uralla.	Review of live-work relationships for construction workers. Assumes that Armidale and Tamworth will capture a proportion of project demand.
Proportion of total workers are counted as Uralla residents (5% for construction and 55% for operational) balance of workers are considered temporary and not	Based on desktop research from various large construction projects across Australia.

influence housing demand (i.e. accommodated outside of Uralla and/or housed in workers accommodation).	
Localised population uplift factors applied to capture likelihood of new resident workers to move with families.	Based on 2021 Census data of workers in relevant construction, maintenance sectors, energy generation who moved to the region in the last five years.
Peak workforce demand and ongoing operational employment is derived directly from individual project Scoping Studies and/or Environmental Impact Assessment (EIAs).	Data directly from proponents.
Workforce demand distribution is allocated annually based on technology type.	Review of completed project workforce plans.
Technology – specific average timeframes applied for approval, approval to commencement, and construction to commissioning. Approval timeframes used were: Solar (3.1years), Wind (3.7years), Battery(1.7years). Approval timeframes for individual projects were altered based on the stage in the approval process. Construction timeframes used were: Solar (2 years), Wind (3 years), Battery (1 year).	Based on a review of 15 approved and 15 completed projects to determine technology-specific historic average timeframes. Averages were calculated monthly with timeframes rounded up to annual. Approval timeframes were accessed from NSW Major Project Portal. Construction timeframes were accessed from various sources including project proponent websites, 'Knowledge Sharing' reports, and government websites.
Interdependence of generation projects so no two generation projects of the same type can occur simultaneously.	Engagement with EnergyCo and project proponents indicate market constraints, such as port capacity, component production, local inputs, etc., that may create natural limits to the number of projects that can be under construction at any one time. Generation projects are therefore assumed to be developed in sequence, the order being dependent on earliest estimated start dates.
All currently submitted or approved projects are developed and become operational.	Only projects that have been submitted for assessment and have at have a Scoping Study (or equivalent) prepared have been included. Projects known to be in the planning phase have not been included.

While all efforts have been made to base assumptions on quantitative and objective criteria, the growth scenario should be regarded as an informed estimate only. The timelines for individual projects will likely vary considerably, especially for more complex projects. For instance, the timeframes for wind farms are expected to be more uncertain than for battery projects. Due to their scale, battery projects are generally approved in relatively quick and consistent timeframes, with construction often completed within a year. In contrast, wind farm timelines vary significantly due to factors such as large geographical areas, community opposition, post-approval amendments, and pre-construction logistics.

Notably, construction timeframes for projects were very consistent. Variations in overall project timelines occurred primarily during the approval and post-approval phases leading into construction. It is during this post-approval period that proponents may sell the project, make amendments, or discover additional issues during pre-site work (e.g., road improvements) that extend the timeline.

The residential demand from the growth scenario illustrated in the charts above (Figure 32 and Figure 33) only captures an estimate of new permanent residents. The REZ projects will also significantly increase demand from temporary workers. While individual workers may only be in the region for short periods or work through DIDO (drive-in, drive-out) or FIFO (fly-in, fly-out) arrangements, the cumulative impact of concurrent projects will be significant.

The chart in Figure 34 illustrates the worker population, distinguishing between permanent workers (included in the demand above) and the temporary workforce. This temporary workforce will still require accommodation, and the scale of this demand will exceed the capacity of Uralla's permanent housing stock.

Various scenarios could explore the potential demand generated by REZ projects. The primary scenario outlined in Figure 34 assumes all projects under assessment or that have been approved would proceed, but generation projects of the same type are sequenced over time. An alternative, more conservative scenario, in which only 75% of private projects (i.e. excluding the transmission project) proceed would still see very high demand (Figure 36). Another scenario considers only 75% of private projects proceed, but all projects are developed as early as possible (i.e. with no sequencing). This scenario would have a much higher peak leading into the completion of the transmission project in 2031 but end up at similar levels of workers as construction completes and ongoing operations commence (Figure 36).

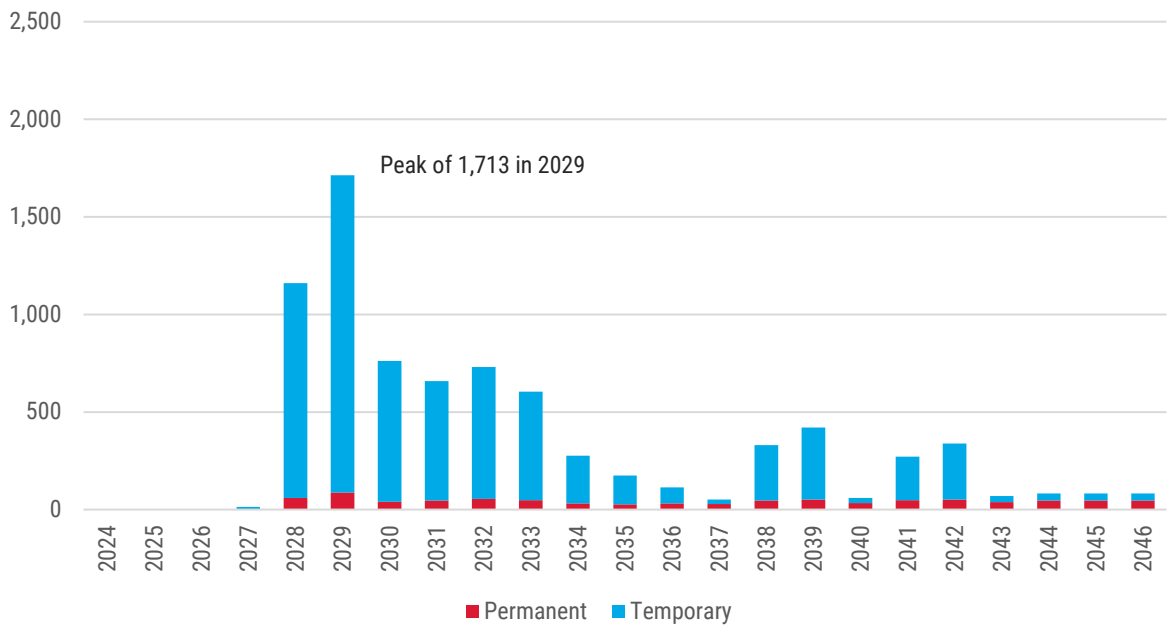


Figure 34 Growth scenario, permanent and temporary workers

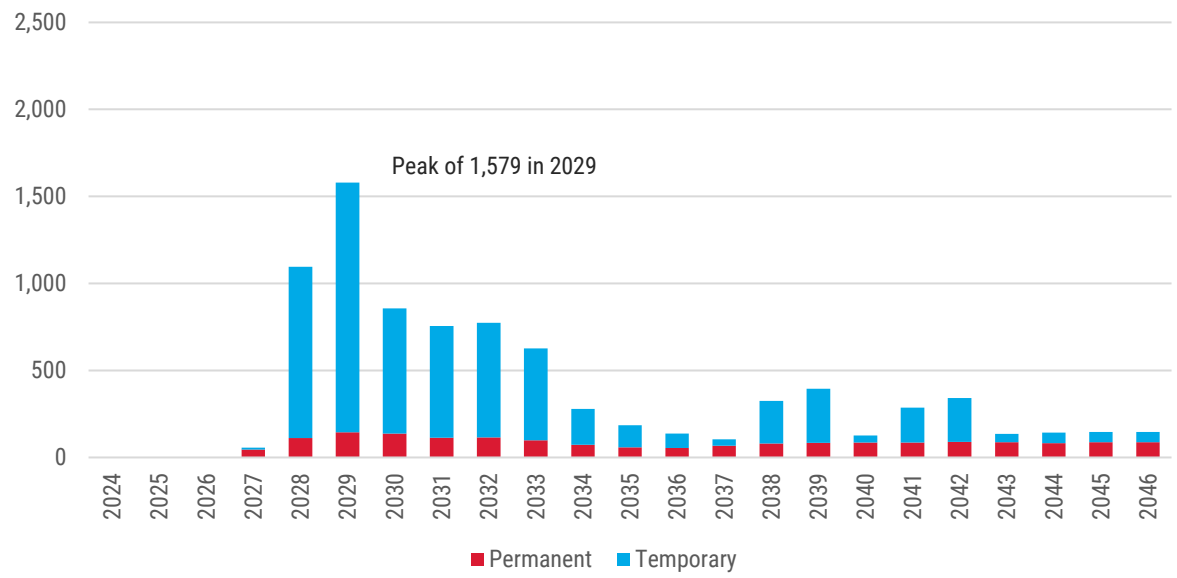


Figure 35 Alternate Growth scenario 1 (75% of private projects proceed)

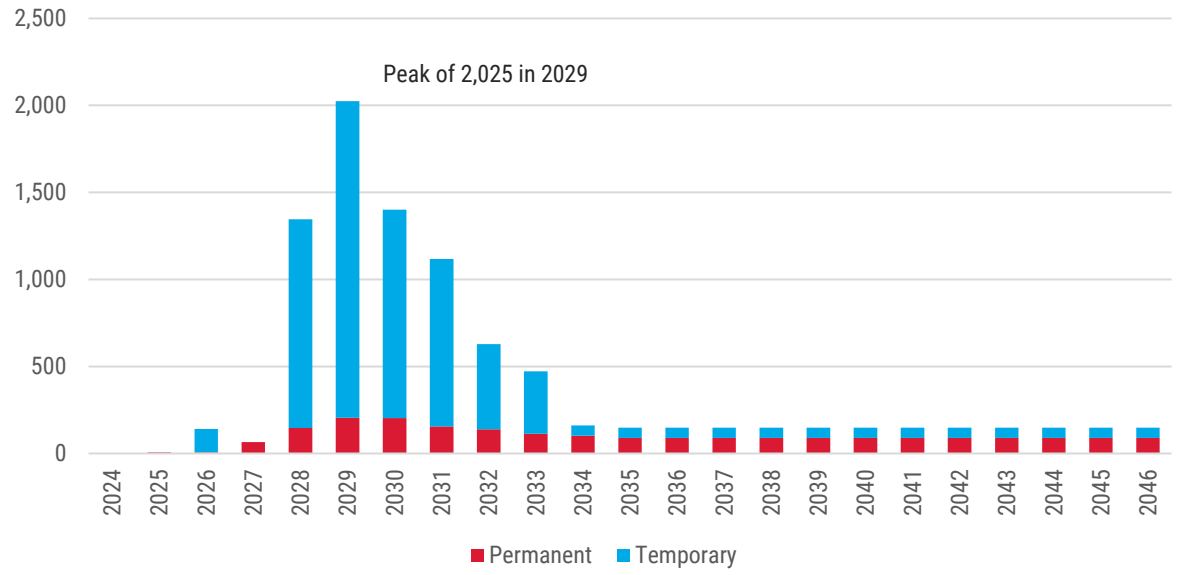


Figure 36 Alternate Growth scenario 2 (75% private projects developed as early as possible)

While the specific outcomes of these scenarios differ in terms of the timing and scale of demand, the overall trend remains consistent. The transmission project, a government initiative fundamental to the progress of the REZ, will drive significant demand leading into 2031. The exact timing of private projects may vary, but the long-term outcome will likely be similar as various projects are commissioned and transition into their operational phases over the coming decades.

These scenarios indicate a clear need for a solution to accommodate a substantial temporary worker population. Uralla Shire Council should work to leverage the significant investment from various project proponents to create positive, lasting outcomes for the community in terms of housing. The increase in permanent workers and their families will also have a positive impact, but mechanisms will be needed to support an increase in housing delivery in the short to medium term.

7 Land Supply

Key takeaways

Long-term capacity within township

If lot sizes continue in line with recent development patterns, there is no expected shortage of developable land within the Uralla township where most of the new development is expected in the next 20-30 years.

Environmental constraints

Areas of Uralla – both within the township and in rural landholdings – are constrained by bushfire and limited areas of flood risk. This limits the potential yield from some otherwise well-located vacant and underutilised blocks. However, it is not anticipated to meaningfully constrain development capacity.

Potential reliance on redevelopment of underutilised sites

A high proportion of estimated supply would require the subdivision of currently occupied (underutilised) properties.

No immediate need for future rezoning of residential land

There is a substantial supply of existing zoned land across the LGA. Strategies should focus on improving utilisation of existing land and supporting dwelling diversity before any major additional land rezoning is considered.

7.1 Overview

Land supply is a crucial element of understanding the development capacity of an area. In more urban or metropolitan settings, vacant land supply is often limited and single dwellings on large lots are also scarce. In these settings where planning controls permit or encourage higher density forms of housing, determining capacity is typically about understanding redevelopment potential. Strata titling is more common, so development capacity is based on a 'one lot with multiple houses' scenario.

Rural and regional areas, such as Uralla, function under different conditions. Rural townships are usually characterised by larger lots, often still reflective of the original pattern of subdivision. There can often be a notable amount of vacant land, and almost always a high quantity of 'underutilised' property. Underutilised property is land that under current conditions could be redeveloped to more standard densities. There are a range of reasons why this occurs, including:

- lower population growth, resulting in slower pace of development and lack of investment interest,
- historic, or current, infrastructure limitations,
- development sector expertise,
- regulatory controls that encourage or support lower density development,
- changing land use from rural land uses to residential,
- historic preferences for low-density living.

This characteristic of larger lot sizes is illustrated in the images in Figure 37 and Figure 38 for the Uralla township and Bundarra village. In Uralla, there are very few 'smaller lots' with even the inner areas maintaining lot sizes of 1,000 sqm and above.

Figure 37 Lot size range, Uralla General Residential Zone

Figure 38 Lot size range, Bundarra Village Zone

Despite this large lot size, the Uralla township still enjoys a compact, walkable settlement where day-to-day goods and services are conveniently available for residents in the township. The map in Figure 39 illustrates how the majority of the existing settlement is within a 20-minute walk of the centre of town. Facilitating residential land supply while maintaining this compact form should be prioritised as this supports many planning principles around enhancing mobility, efficient use of infrastructure, access to services, and preservation of agricultural land uses.

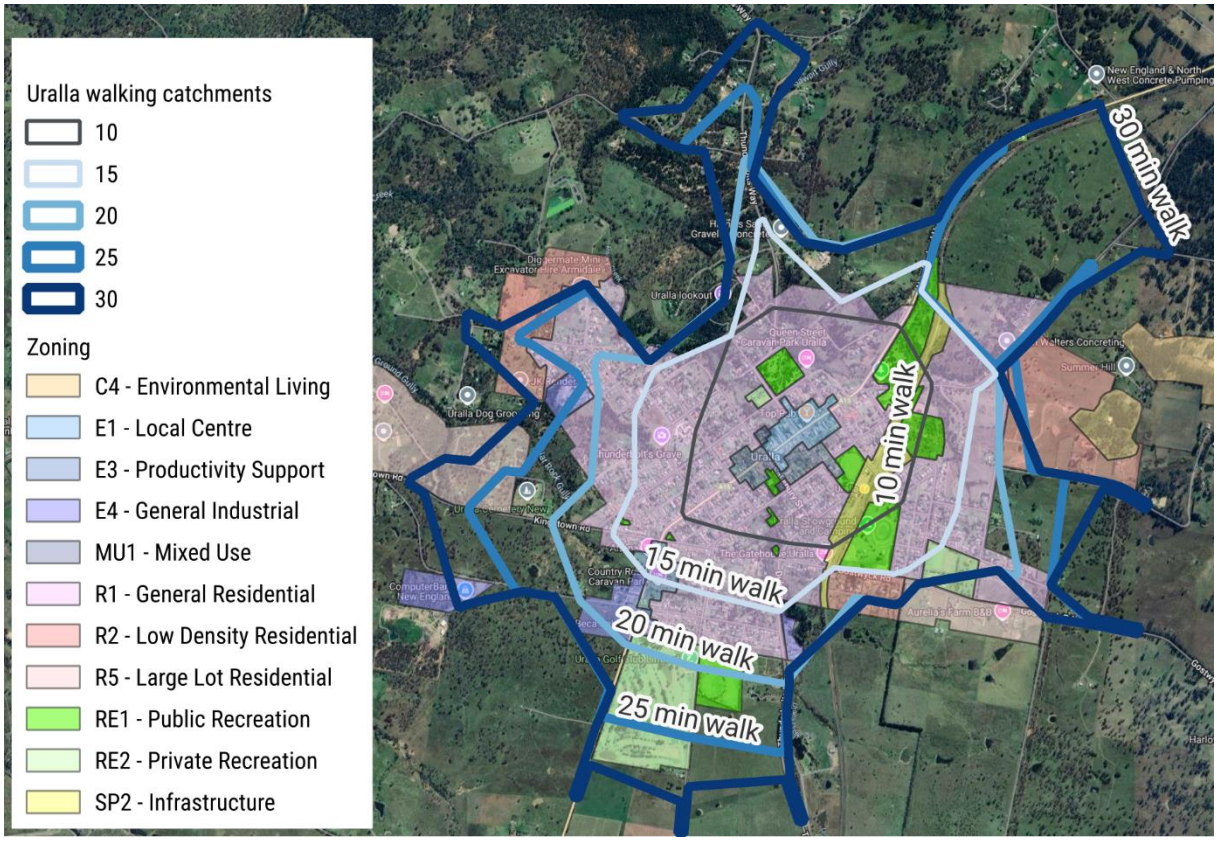


Figure 39 Uralla walking catchment

Ultimately, assessing land supply in rural and regional areas is typically about understanding the capacity to deliver various forms of housing on a single lot. While some strata will occur, the conditions are typically a 'one lot, one house' scenario as being reflective of the type of development that will occur into the foreseeable future.

Current planning controls throughout Uralla's residential areas support this 'standard' of lower density forms of development through zoning and minimum lot size controls. Current residential zoning is General Residential, Low Density Residential, and Large Lot Residential zones with Bundarra also having the Village zone (see maps in Appendix E). Minimum subdivision lot sizes are designated under the principal development standards for areas across the municipality and are one of the primary controls on development density. As indicated above in the lot size maps and discussed below, development is typically being delivered on lots well above the minimum lot size controls for the main residential areas in Uralla and Bundarra.

7.2 Supply analysis

Land supply assessment will often apply these minimum lot size controls as a method for estimating yields and ultimately land supply. While these can be a decent measure for calculating yields in low density or large lot residential areas, they are often not representative of the actual yields being achieved in general residential areas. In Uralla, for example, recent subdivision activity is producing lots almost double the size of the minimum lot size permitted under planning controls. This is explored in more detail below; however it indicates that an approach that accounts for location-specific market preferences should be considered in land supply assessments.

The land supply assessment includes existing residentially zoned land in the General Residential, Low Density Residential, and Large Lot Residential zones as well as land in the Village Zone and Environmental Living Zone. The assessment does not include any other rural zones or conservation zones.

The land supply assessment considers a range of constraints to development, including flooding, bushfire, slope, and other environmental constraints. Yield estimates are based on locally derived median lot sizes for each zone to estimate potential yields from vacant and underutilised property. In instances where a calculated median lot size was smaller than the minimum lots size stated under the principal development standards, the minimum lot size was applied.

Once the draft yield estimates were calculated for all areas, the outputs were reviewed by Council and any additional or known constraints or approvals that were not picked up through modelled parameters were applied.

The approach to estimating land supply applied in this project is outlined in detail in Appendix I.

Relevant to note here are the large median lot sizes applied in the modelling which are based on actual recent development. Table 4 below lists the calculated median lot size and the minimum lot size under the principal development standards for some of the main residential zones. As indicated, the median being achieved in the General Residential and Village zones is much higher than minimum lot size. In the land supply estimates below, the calculated median has been applied which results in a very conservative estimate of the full potential of existing zoned residential land, particularly in Uralla which provides the majority of potential yield.

Table 4 Calculated median and PDS minimum lot size comparison, sqm

Zone and suburb	Calculated median	PDS minimum lot size
General Residential, Uralla	1,051	560
Large Lot Residential, Invergowrie	23,986	20,000
Large Lot Residential, Saumarez Ponds	23,097	20,000
Large Lot Residential, Uralla	22,035	20,000
Village, Bundarra	2,023	560

7.3 Land supply estimates

In the land supply estimates presented below, several terms are used which aim to categorise land based on differing characteristics. These characteristics include land size, redevelopment potential, status (in terms of vacant or occupied), and proximity to key infrastructure. The definitions of terms are provided below:

- **Vacant:** a property that has no improvements, or minimal improvements such as sheds or fencing.
- **Underutilised:** this classification is allocated to properties that are developed with a single dwelling improvement and have a land area that could accommodate two or more lots (accounting for development takeouts such as access) based on the median lot size. Yields for these properties discount the existing dwelling.
- **Retail:** a retail parcel is an existing vacant parcel that is not of a size that can accommodate further subdivision based on the calculated median lot size.
- **Approved:** Approved yield applies to properties with a DA that has been approved since 2017. Where DAs are for staged subdivision, yields only include lots yet to be developed. Where a property has an existing dwelling, yields discount the existing dwelling. Approved supply excludes subdivisions classified as boundary realignments as well as any subdivisions proposed outside of the residential zones forming part of the analysis.
- **Subdividable:** a property that is vacant and also has a land area that could accommodate two or more lots (accounting for development takeouts such as access) based on the median lot size.
- **Servicing:** this category is allocated to land based on discrete distance from the existing sewerage network. It only applies to sites in Uralla in the General Residential zone.

The tables below provide the supply estimates (Table 5) and the count of developable properties that have been included in the analysis (Table 6) for each of the forecast areas in Uralla as well as the share of supply provided through retail, approved, vacant subdividable, and underutilised properties.

Across the municipality, there is an estimated land supply to accommodate an additional 1,100 dwellings. While the vast majority of this (72%) is provided through underutilised sites, there is still capacity for 129 dwellings on retail lots or through approved subdivisions.

Small scale character of land development in Uralla

The character of land development in Uralla is typically small scale. Of all approved DAs that included subdivision since 2014, 17% were for simple boundary adjustments. For subdivision approvals in residential zones, two or three lot subdivisions accounted for 74% of all DAs and around 40% of new lots.

Over the past decade, only four DAs for subdivisions of 10 or more lots have been approved. The largest of these, a 60-lot subdivision (representing 17% of all approved lots in the last 10 years), was approved nine years ago but has not been developed. This small scale of development is typical for projects led by local landowners, as opposed to professional developers who would deliver subdivisions of dozens or even hundreds of lots in larger centres.

This model presents both challenges and opportunities for the Council. The lack of professional expertise among small-scale developers can lead to difficulties navigating regulatory processes, inefficiencies in delivery, and uncertainty around the actual completion of approved developments.

Small-scale developments can produce positive outcomes and offer lower barriers to entry for local landowners. However, additional guidance and support are often needed to achieve optimal results. Council could support these efforts by developing a set of clearly defined—and clearly communicated—infrastructure standards. Toolkits and guides tailored for small-scale developers could further facilitate well-planned, compliant development.

Approved lots provide an indication of supply pipeline as well as increased certainty of new supply coming online in the near future. The Uralla township and Invergowrie-Saumarez Ponds both have a level of approved supply. However, this isn't always substantially adding to overall supply of land, particularly in Uralla. There are numerous subdivisions which are configurations of multiple parcels, many either adding slightly to overall number of land parcels (e.g. subdivision of four lots into six lots), and even a net reduction (e.g. subdivision of three lots into two lots).

The maps in Figure 42 through Figure 44 demonstrate the distribution and extent of properties across the various locations. Note that yields for individual properties have been excluded from the maps in this report but have been provided to Council.

Both the yield and the counts are important to consider particularly for the vacant subdividable and the underutilised properties as some high yield estimates may be reliant on only a few properties being developed. As these figures indicate, there is a heavy reliance on the development (i.e. subdivision) of land to provide future supply.

When considering land supply by land use zone, the majority of supply, as expected, is within the General Residential zone, which is located solely in Uralla. Approximately one-third of the estimated supply is within the Large Lot Residential zone, primarily in the Invergowrie-Saumarez Ponds area.

Land supply by zone indicates a lower count of developable lots, as well as a lower yield than exists for the General Residential Zone. Despite this lower number, there is not considered to be any immediate need to provide additional residential land, including low-density or large-lot residential land, particularly in the Uralla Township. There is relatively low overall demand in the Uralla Township (see Section 8 below), with most of this demand being driven by an ageing population.

With a general oversupply of residential land, there should be a focus on consolidating existing stock and delivering housing diversity that aligns with the needs of Uralla's changing demographics, being smaller, more compact, and low-maintenance dwellings. Providing additional lower-density residential areas while current stocks still exist risks creating a mismatch in development priorities and exacerbating the current housing profile of Uralla of large houses on large lots.

There is not considered to be any immediate need provide additional residential land in Uralla. Actions should focus on utilisation and consolidation of existing zoned land, with a clear focus on providing more diverse forms of housing to meet community needs.

Aside from sites with development approvals, supply estimates are based on either calculated median lot sizes, or the PDS minimum lot size. As outlined above in section 7.2, the medians applied in Uralla General Residential Zone (1,051sqm) are notably higher than the permitted minimum lot size (560sqm). Applying an alternate smaller lot size to the calculations would substantially increase the potential supply estimates.

As an example, if only the existing properties included in the current analysis were considered and a lot size of 811sqm was applied in the calculation, which is the median for recently produced lots that are less than 1,000sqm in area, the resulting supply estimate for the Uralla General Residential Zone only would increase to 939 (up from 597). If the lot size applied in the calculation was 600sqm, closer to the

minimum permitted, the supply estimate for the Uralla General Residential zone would increase to 1,259. These figures exclude any additional properties that may be included as underutilised based on a lower median lot size. If these were included, the estimates would be higher still.

While the supply provided through underutilised properties across the LGA is substantial, additional factors should be noted for the Invergowrie-Saumarez Ponds area. A very high proportion of the calculated supply in this area comes from underutilised sites. Although the method used to derive these estimates has accounted for mapped constraints, such as bushfire risks at the property level, it has not considered broader landscape risks or undertaken the detailed on-site assessments that would be necessary when preparing a DA.

The western part of the Invergowrie-Saumarez Ponds area has been identified as having significant fire risk. While this risk may be mitigated to an acceptable level for individual properties, broader considerations arise regarding increased dwelling densities in areas with relatively poor access to water and limited egress.

In the western area of Invergowrie, several underutilised properties have relatively high estimated yields. However, many of these may not reach these densities despite the 2-hectare minimum lot size in the area. If these estimated yields are not achieved, or if increased minimum lot sizes are introduced to reflect the landscape-scale bushfire risk, the overall estimated supply in the Invergowrie-Saumarez Ponds area could be substantially reduced.

Bushfire risk is also present in the Uralla Township (Figure 41), particularly to the north and west of the town. Bushfire risk has been accounted for in the supply estimates, however the broader landscape risk that exists in Invergowrie's west that could further impact realisation of supply will not have as much of an influence in Uralla.

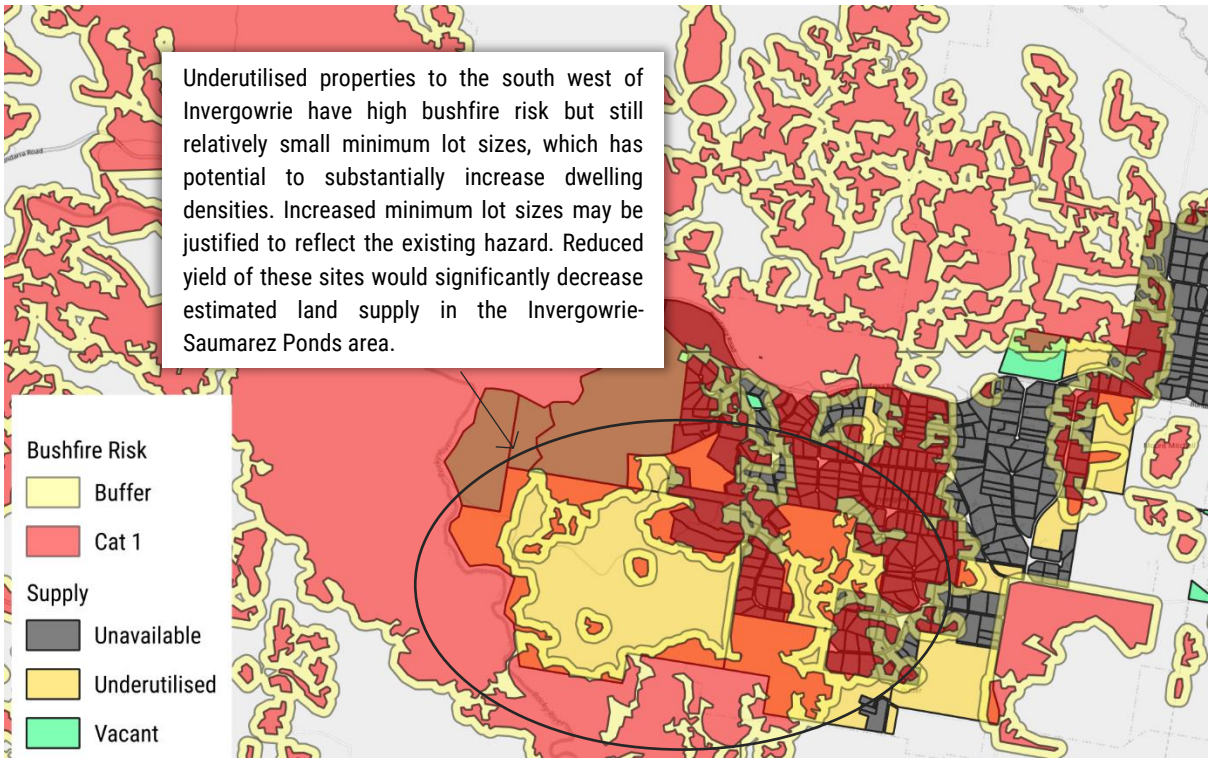


Figure 40 Bushfire prone mapping, Invergowrie-Saumarez Ponds area

Figure 41 Bushfire prone mapping, Uralla Township

Table 5 Estimated land supply yield by forecast area, 2024

	Retail	Approved	Vacant Sub.	Underut.	Total	Retail	Approved	Vacant Sub.	Underut.
Uralla Township	32	41	135	457	665	5%	6%	20%	69%
Invergowrie-Saumarez Ponds	9	27	11	304	351	3%	8%	3%	87%
Uralla Balance	19	1	33	31	84	23%	1%	39%	37%
Uralla LGA	**60**	**69**	**179**	**792**	**1,100**	**5%**	**6%**	**16%**	**72%**

Table 6 Count of developable properties by forecast area, 2024

	Retail	Approved	Vacant Sub.	Underut.	Total	Retail	Approved	Vacant Sub.	Underut.
Uralla Township	32	18	18	100	168	19%	11%	11%	60%
Invergowrie-Saumarez Ponds	9	2	1	18	30	30%	7%	3%	60%
Uralla Balance	19	1	3	12	35	54%	3%	9%	34%
Uralla LGA	**60**	**21**	**22**	**130**	**233**	**26%**	**9%**	**9%**	**56%**

Table 7 Estimated land supply yield by zone by forecast area, 2024

	General Residential	Low Density Residential	Large Lot Residential	Village	Environmental Living	Total
Uralla Township	597	45	22	0	1	665
Invergowrie-Saumarez Ponds	0	0	348	0	3	351
Uralla Balance	0	23	0	59	2	84
Uralla LGA	**597**	**68**	**370**	**59**	**6**	**1,100**

Table 8 Count of developable properties by zone by forecast area, 2024

	General Residential	Low Density Residential	Large Lot Residential	Village	Environmental Living	Total
Uralla Township	151	10	6	0	1	168
Invergowrie-Saumarez Ponds	0	0	27	0	3	30
Uralla Balance	0	1	0	32	2	35
Uralla LGA	**151**	**11**	**33**	**32**	**6**	**233**

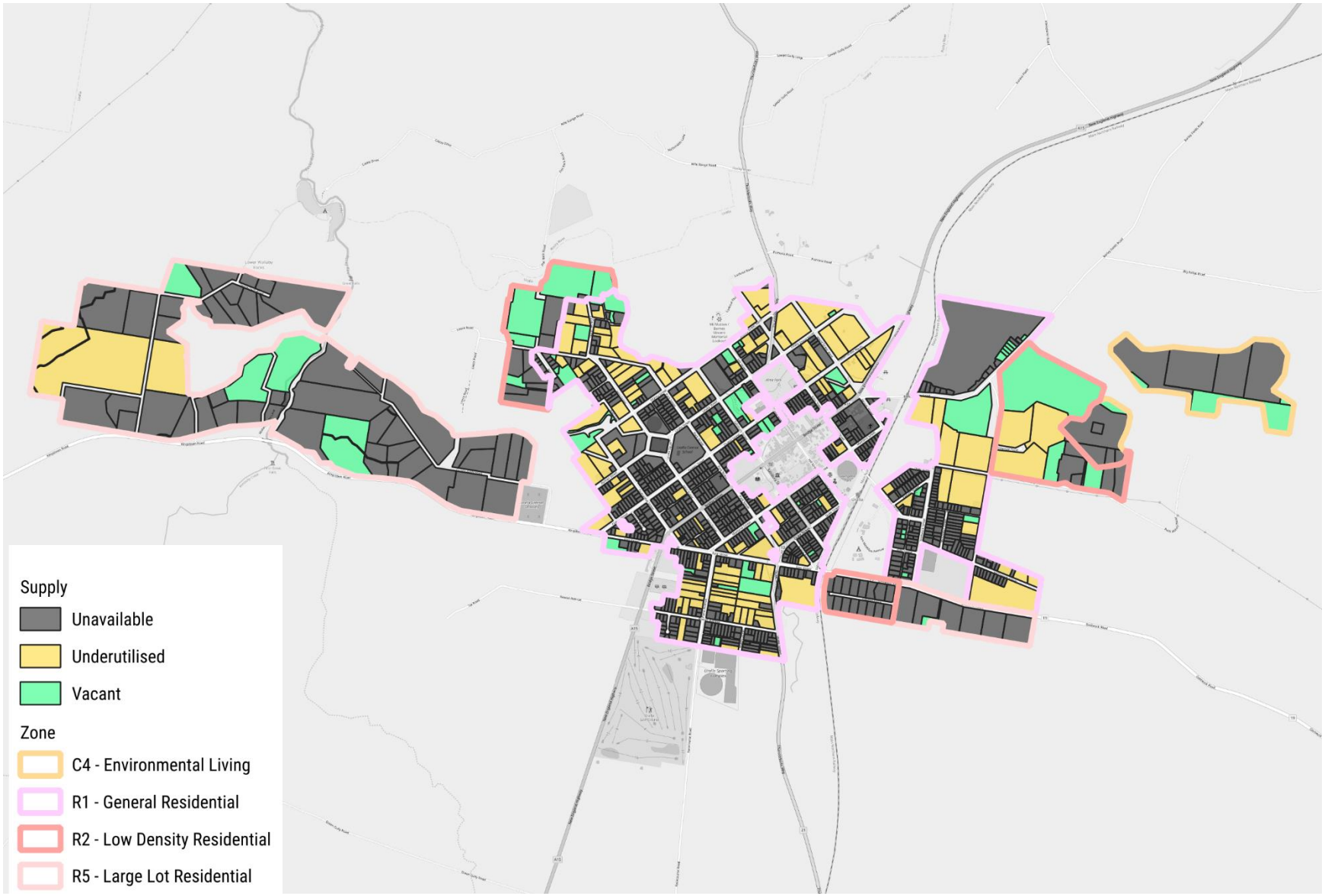


Figure 42 Supply status, Uralla Township

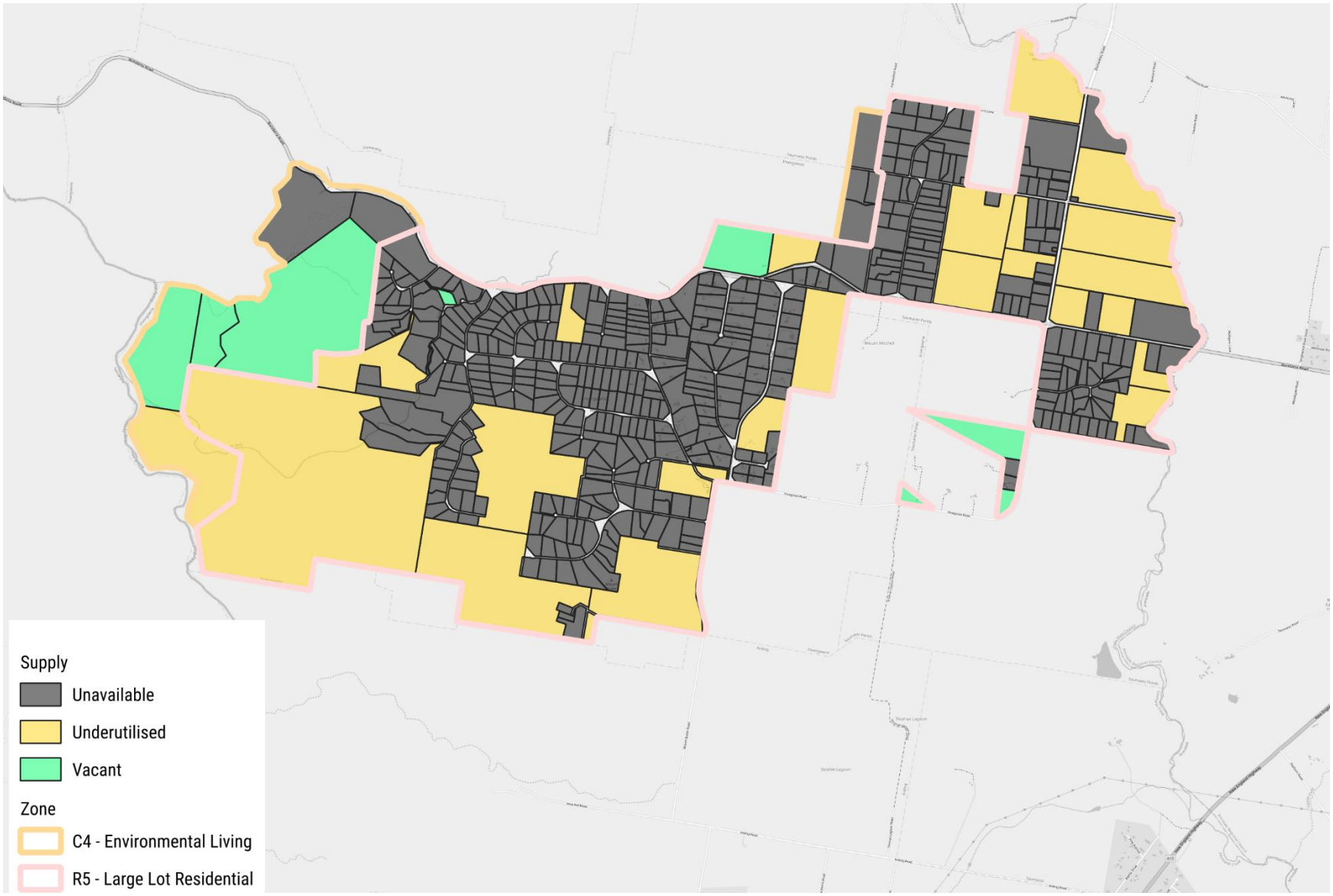


Figure 43 Supply status, Invergowrie-Saumarez Ponds

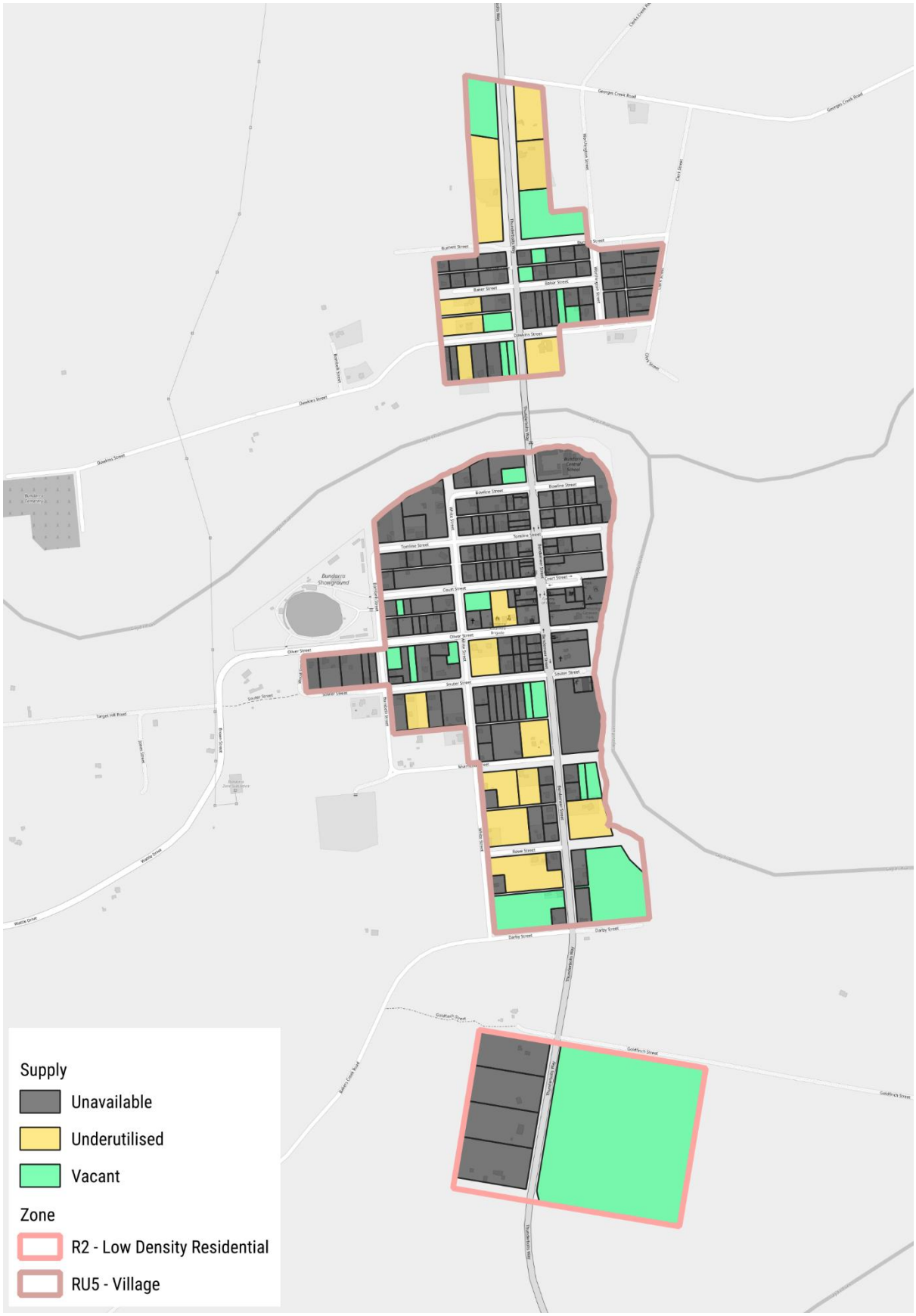


Figure 44 Supply status, Bundarra

8 Supply and demand scenarios

Key takeaways

There is an adequate supply of zoned land to meet demand

Across the LGA and each forecast area, there is adequate zoned land to meet base case demand and demand under the growth scenario over 20-years.

Invergowrie-Saumarez Ponds has the tightest supply

Invergowrie-Saumarez Ponds exhausts vacant and approved supply within 10 years, requiring the redevelopment of underutilised properties to meet forecast demand. Supporting redevelopment of existing zoned land should be prioritised over opening up more large lot residential land.

Long-term supply is dependent on development of larger vacant and underutilised parcels

The LGA has a substantial amount of large vacant and large occupied properties that could accommodate further subdivision. Facilitating the development of these properties will be necessary to ensure an appropriate ongoing pipeline of supply is provided to support growth.

Increased demand from REZ projects will likely put additional pressure on supply

Demand from the REZ projects will likely increase consumption of existing supply, however there is more than adequate amount of land available. The main issues will be maintaining a pipeline of development-ready land, and supporting ongoing delivery of housing.

Explore various options to support temporary workers

Council should explore opportunities for a centralised temporary worker site that will meet some of the demand while also providing legacy outcomes in terms of infrastructure and/or housing. Other alternative methods for meeting temporary worker demand should be explored to mitigate, as best possible, potential negative outcomes of large influx of workers while capturing benefits for individuals and the community.

8.1 Overview

This section of the Report summarises various residential land supply and demand scenarios. The scenarios below apply the underlying dwelling demand from the base case forecasts and examine its impact on land supply. Land supply is presented across various categories, or combinations of categories, consistent with those outlined in section 7 above. As discussed in section 7, these categories represent different levels of certainty in land readiness for development. Accordingly, combining categories can provide a simple representation of sequencing. For example, existing retail lots are ready for immediate dwelling development. If no other land is subdivided, demand will consume these retail parcels. However, in the short term, it is likely that approved subdivisions will be developed, adding to the available supply.

Underutilised properties are an important source of future supply, particularly in inner, established areas. However, all other factors being equal, the analysis assumes that a vacant property with subdivision potential would be developed before an identical adjacent property that is already occupied by a dwelling. As such, underutilised properties are sequenced after vacant subdividable land.

In reality, development may proceed in a variety of ways. Properties with existing approvals may be amended, delayed, or not developed at all, while underutilised properties may receive approval for multi-dwelling developments, which could be constructed and sold before existing retail lots are developed. Consequently, the supply and demand representation in the charts below is intended to illustrate how demand might utilise a potential pipeline of land supply. It does not attempt to capture every possible combination or permutation of development pathways.

The charts presented below present some of the key outcomes of the supply and demand analysis. Data tables for each scenario and forecast region are provided in Appendix J.

8.2 Resident demand

The potential demand from REZ projects is a key issue for Uralla. Scenarios outlined in section 6.4 indicate that some of the demand will be from new residents, while the majority of workers will be temporary. This section looks at the resident demand and its impact on land supply, while section 8.3 outlines matters relating to temporary worker demand.

The chart in Figure 45 illustrates how annual demand impacts on combinations of supply categories. The supply categories presented are cumulative with each proceeding category including the supply counts from the previous. As indicated in the chart, there is a sufficient supply of zoned residential land to accommodate currently forecast demand beyond a 20-year horizon. While New South Wales does not have legislated land supply requires as other states do, a commonly applied requirement is to have 15 years' of zoned supply. This is considered adequate to account for the time required to accommodate any necessary processes of rezoning, servicing, subdivision and development.

Importantly, while modelling indicates there to be adequate supply provided through vacant land or land with a DA, there is a substantial level of untapped residential land that may be provided from underutilised sites. While not all of these will be developed, these supply figures also account for the low development densities (discussed in section 7.3 above). Ideally, to meet the needs of the future population and household structures and to increase dwelling diversity, the redevelopment of underutilised sites and vacant sites in and around the Uralla town centre will be completed at densities closer to minimum lot sizes stipulated in the PDS.

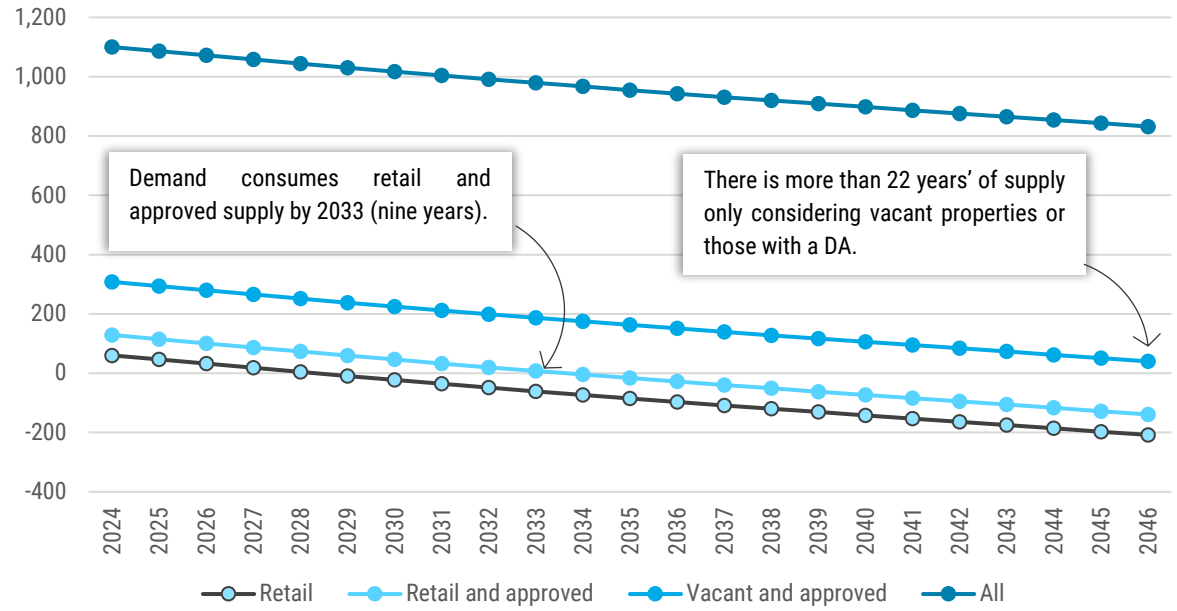


Figure 45 Supply vs base case demand, Uralla LGA

At an LGA level, the current provision of zoned land is adequate to accommodate future demand. The results for the two main forecast areas does differ slightly from the municipal-wide outlook. Invergowrie-Saumarez Ponds has relatively strong demand, indicative of its attractive characteristics which include its natural setting as well as its proximity to Armidale. Supply, however, is somewhat limited and will require the realisation of new properties through the redevelopment of currently underutilised sites. As outlined in Section 7.3 above, further reduction in yields from sites in the southwest of Invergowrie will further impact potential supply in this area. There are, however, still a number of underutilised properties in Saumarez Ponds which could provide additional supply and do not have the same level of environmental risk.

Strong demand and somewhat limited supply in Invergowrie-Saumarez Ponds may suggest that additional provision of large lot residential land could be warranted. However, there are other issues with delivering lower density forms of residential development, particularly when their primary relationship is with adjacent municipalities.

While large lot residential land provides for a certain type of housing product, it is a relatively inefficient use of land, providing for fewer houses on much greater areas of land. It also does not provide for the type of housing that Uralla will be requiring to meet the needs of its ageing population.

The location of Invergowrie-Saumarez Ponds also means that residents' social and economic relationships are primarily with Armidale. Place of work data from the Census indicates that 72% of working residents in Invergowrie-Saumarez Ponds work in Armidale, while only 15% work in Uralla. As such, businesses, schools and other organisations in Armidale will likely be capturing the benefit of increased population in Invergowrie-Saumarez Ponds.

While supply may be constrained in Invergowrie-Saumarez Ponds area relative to supply, it is recommended that no expansion in this area is required and a strategy for better utilisation of existing properties with lower environmental constraints is a more appropriate response. This would still more than meet demand over the coming decade at which time further review of the precincts future status could be undertaken. The chart in Figure 46 illustrates the amount of retail and approved supply, which would provide around seven years of supply. The chart also indicates all supply, as well as a dashed

line indicated the potential level of all supply in the area even when highly constrained underutilised properties in the west of Invergowrie were discounted which still results in ample supply over the long term.

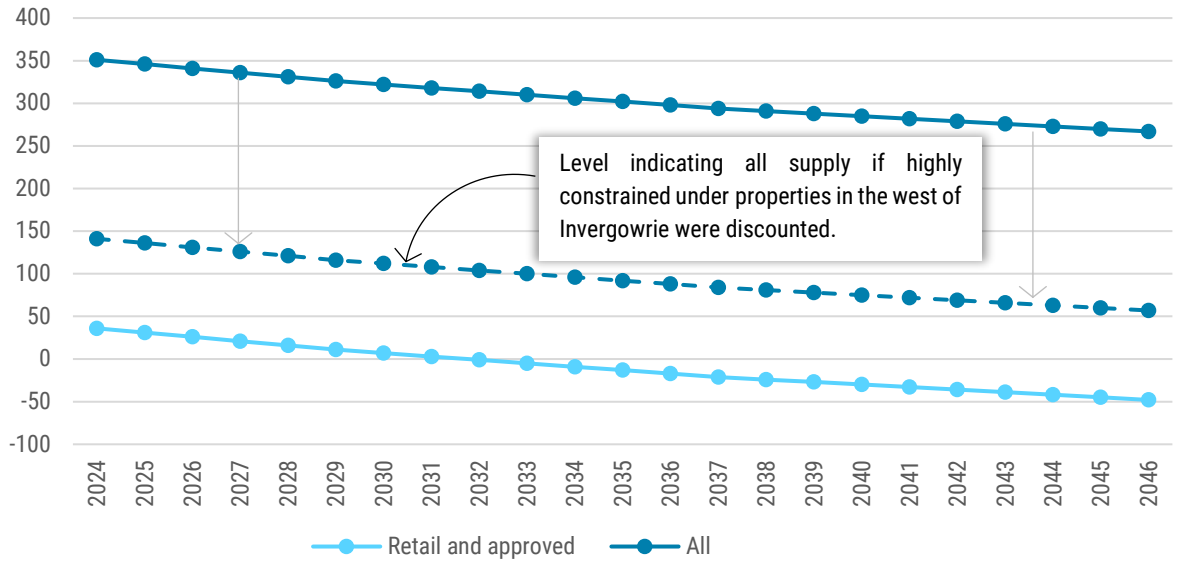


Figure 46 Base case demand on supply categories, Invergowrie-Saumarez Ponds

The impact of additional demand from the REZ developments will have the greatest impact in the Uralla Township. Under the growth scenario, existing retail and approved supply of land would be consumed four years earlier by 2032-33 (Figure 47). This is, however, reliant on a notable portion of demand being met through the occupation of currently unoccupied dwellings. If owners of unoccupied dwellings do not release these into the market, there could be additional pressures on supply of development-ready land.

Under both the base and growth scenarios, there will continue to be a need to support the pipeline of new housing, particularly given the historic nature of small-scale subdivision and housing development.

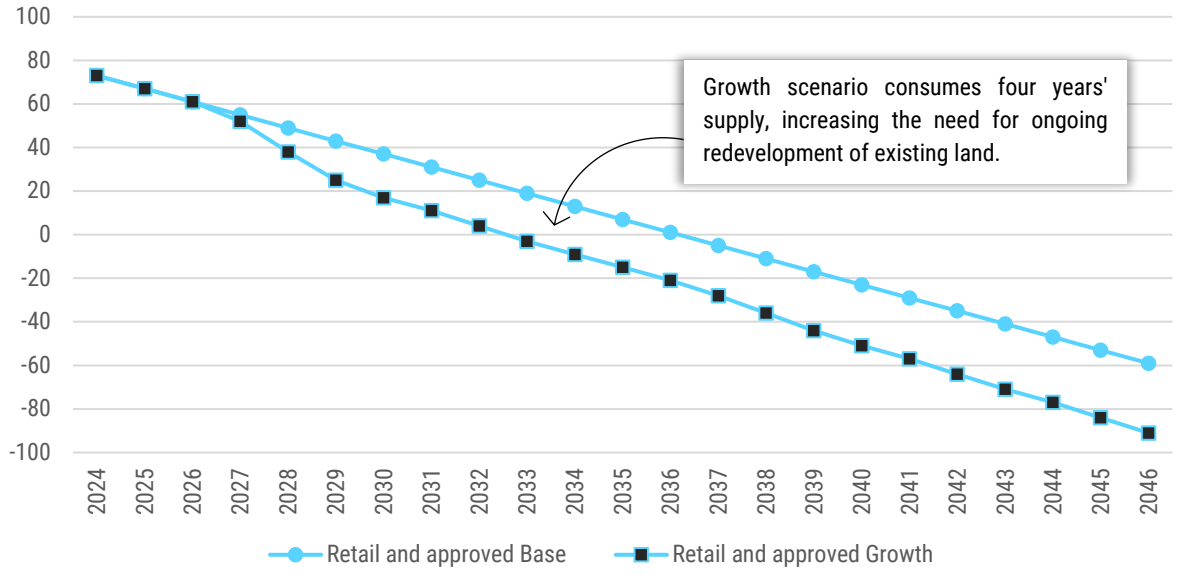


Figure 47 Demand under base and growth scenario on retail and approved sites, Uralla Township

8.3 Temporary worker demand

As outlined in section 6.4, there will be a substantial influx of temporary workers into the region over the coming years. Many approved projects indicated that their accommodation strategy involves workers finding their own housing in local towns.

Engagement with proponents of projects currently under assessment has highlighted the limitations of the local housing sector in small towns. EnergyCo has been in ongoing discussions with the Council and has stated that they are exploring options to accommodate 600 workers without negatively impacting the established housing stock. Similarly, other private project proponents are preparing for potential work camps.

During stakeholder engagement undertaken as part of this project, Council, EnergyCo, and several developers recognised the potential benefits of a centralised, co-ordinated, semi-permanent solution for housing workers during the extended period of Renewable Energy Zone (REZ) construction projects. By establishing a centralised facility in an appropriate location, there is potential to create legacy infrastructure that could support future development. This could include infrastructure upgrades or access to accommodation that could be repurposed for other housing needs within the local community.

Conducting detailed assessments to identify potential sites for worker accommodation is beyond the scope of this project, particularly as no specific proposal is currently known. However, information gathered during engagement has identified general criteria to assist in narrowing down suitable locations for further exploration at the appropriate time. These criteria include:

- Appropriate land area: While no minimum land area was identified, larger sites (10–20 hectares or more, depending on number of units to be provided) would be preferred.
- Topography: Flat or gently sloping land to minimise site preparation.
- Accessibility: Direct access to major roads.
- Environmental considerations: Avoidance of major environmental risks.
- Proximity to services: Relatively close to existing services.
- Buffer zones: Adequate separation from established residential areas.

The map in Figure 48 indicates potential areas for further investigation, with areas to the south being the best candidates due to lack of bushfire risk, gentle topography, buffer from non-residential uses, and good access to various existing transport routes.

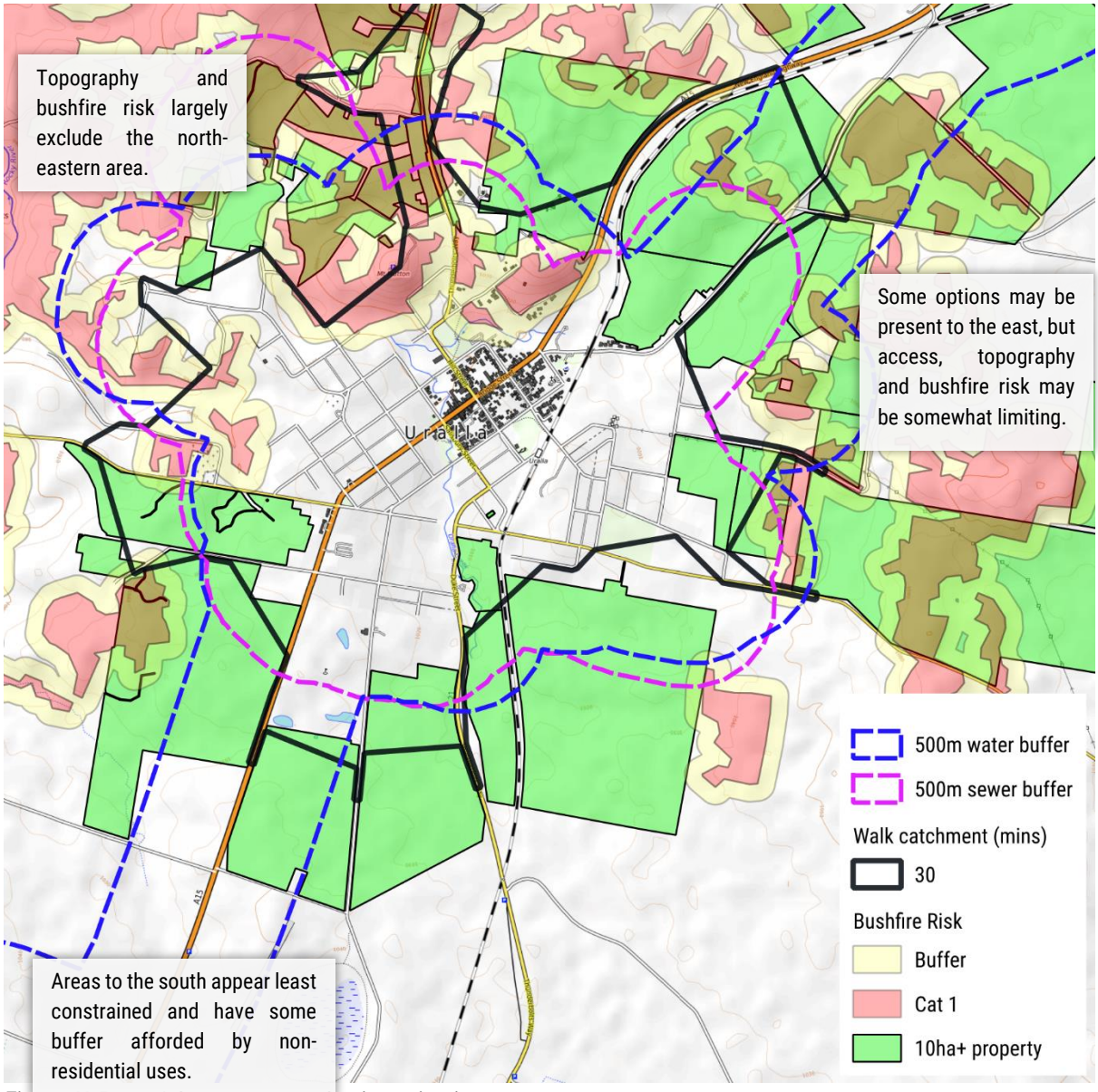


Figure 48 Potential temporary worker investigation areas

It is important to note that a centralised accommodation facility will not necessarily capture all the demand from every individual project. There will likely be other initiatives required to address the demand from the pipeline of private projects. Council should explore options to better utilise existing housing stock, such as having existing homeowners host workers. This approach has a number of benefits social, economic and environmental benefits, including:

- Better utilisation of currently underutilised housing stock and infrastructure.
- Supplemental income for individual households that is more likely to be spent directly in the local economy.
- Supports positive social integration and addresses some of the negative social outcomes that can arise from single dwellings being let to groups of workers.
- Customised arrangements that suit the needs of homeowners and the tenant worker.

While a range of other initiatives can be explored, this type of action can significantly improve relationships between project proponents, workers, and communities while fostering long-term positive outcomes for the local housing market and social fabric.

9 Emerging Directions

Analysis and stakeholder engagement have indicated key actions and emerging themes for consideration in the Uralla Local Housing Strategy. These recommendations centre around creating housing solutions that meet the needs of the future population, supporting an appropriate pipeline of residential development, providing certainty and financial viability for developers, and supporting positive social outcomes for both existing residents and the additional population expected to support the renewable energy projects.

9.1 Critical Challenges and Opportunities

Housing Market Pressures

What is the challenge and opportunity?

- Uralla's housing market is constrained by low stock and high costs, exacerbated by a lack of temporary and permanent housing. Rising demand from renewable energy projects has driven up rents and displaced residents.
- There is a mismatch between available housing and demographic needs, with ageing residents requiring smaller, low-maintenance homes while large houses dominate the market.

What role can council play?

- Partner with Community Housing Providers (CHPs) to deliver affordable and temporary housing to meet immediate demand.
- Offer incentives for developments aligned with housing needs.
- Develop and promote alternative tenure models like Community Land Trusts (CLTs) to stabilise housing costs.
- Advocate for state and federal funding to expand affordable housing programs.
- Engage with older residents to understand preferences and remove barriers to downsizing.

Population and Workforce Dynamics

What is the challenge and opportunity?

- The ageing population is driving a demand for housing typologies that are currently underprovided or not provided in Uralla, including aged care, independent living, and downsized housing.
- The temporary population spike from REZ construction will strain resources but could provide an opportunity for legacy infrastructure and housing development.

What role can council play?

- Incorporate provisions in the Local Environmental Plan (LEP) for Temporary and Seasonal Workers Accommodation once completed.
- Facilitate the development of centralised, temporary housing facilities, ensuring they can be repurposed post-construction.
- Collaborate with renewable energy developers to ensure temporary infrastructure has the potential to transition into permanent housing or other uses.
- Develop infrastructure plans that integrate temporary needs with long-term population and housing strategies.
- Incentivise the development of retirement housing, independent living units, and aged care facilities through planning and financial measures.

- Promote infill development in walkable areas near amenities to accommodate older residents.

Infrastructure and Land Supply

What is the challenge and opportunity?

- Although the township has sufficient land for future growth, environmental constraints like bushfires and flooding limit some development.
- Coordination of zoning and infrastructure standards is required to unlock development potential.
- A lack of information and consistency in infrastructure development standards has historically been a barrier to development. There is an opportunity to improve availability of infrastructure data and develop consistent standards to support the development sector.

What role can council play?

- Identify gaps in environmental risk mapping to guide future development away from high-risk zones (e.g. digitise results of the Rocky River & Uralla Creek Flood Study)
- Develop an infrastructure delivery plan and proactively prepare business cases for funding of infrastructure.
- Align local infrastructure standards with regional or state guidelines to improve clarity and consistency for developers.
- Create a centralised database of infrastructure data and planned upgrades (e.g. GIS tools) for developers and the community.
- Provide technical assistance or shared resources to support local developers in navigating infrastructure requirements.
- Update Section 7.11 agreements or pursue voluntary planning agreements (VPAs) to equitably distribute development costs among multiple benefitting landowners.

Economic Growth and Community Balance

What is the challenge and opportunity?

- Rising property prices may attract investors who can deliver smaller, more affordable housing.
- The development sector is primarily local and relatively small scale. Council can support the local development sector by providing tailored assistance that simplifies processes, reduces risks, and improves access to resources.
- Community benefit sharing from renewable energy projects could provide critical funding for infrastructure and housing but requires careful planning to maximise impact.

What role can council play?

- Simplify the development approval process by providing user-friendly guides and pre-lodgement consultations.
- Offer financial incentives, such as reduced fees for small-scale developments that match with housing priorities.
- Facilitate access to training and mentorship programs to build capacity within the local development sector.
- Continuing to monitor and update Council's benefit sharing policy to ensure transparent standardised strategies are applied while also capturing appropriate level of benefits for the local community.
- Actively engage with potential investors to highlight opportunities for delivering diverse housing types.

- Use council land or advocate for state/federal grants to pilot projects that demonstrate smaller, affordable housing models.

9.2 Emerging directions

Emerging directions that meet the needs of the future population, support an appropriate pipeline of residential development, and provide support for developers include:

Policy and planning alignment

- Conduct a comprehensive policy review to address local challenges and infrastructure gaps.
- Recognise and respond to housing affordability pressures through targeted policy frameworks.
- Align local planning instruments with demographic needs.

Targeted housing development

- Support the development of dedicated retirement housing, addressing a critical market gap
- Support Community Housing Providers (CHPs) to create smaller one- and two-bedroom dwellings
- Enable Aboriginal Housing Providers to develop diverse housing options that respect cultural needs

Enhancing existing neighbourhoods

- Maintain a compact, walkable township by limiting additional land releases
- Focus on infill development and efficient land use
- Preserve the town's character and infrastructure efficiency

Innovative housing solutions

- Investigate alternative tenure models like Community Land Trusts (CLTs)
- Provide affordable, community-governed housing options
- Provide support around new housing innovations

Benefitting from workforce accommodation

- Develop strategies for temporary and seasonal workers related to renewable energy projects
- Explore centralised worker accommodation facilities
- Create pathways for long-term housing for multi-year workers
- Support initiatives that make better utilisation of existing housing stock

The overarching goal is to create a flexible, inclusive housing strategy that supports Uralla's growth, preserves its community character, and addresses the diverse needs of current and future residents, particularly in the context of emerging renewable energy projects.

The next phase of the project will be to prepare a draft strategy, utilising the evidence base and emerging directions from this Key Issues Paper. The strategy document will include the Vision, Priorities, and Actions as key elements that will aim to deliver on the housing needs of the community of the coming years.

Appendices

Appendix A – Policy context

The policy review provided below is divided into two sections, one related to housing and the other energy. Under each section, a selection of relevant local, regional and state policies and strategies are briefly summarised.

Local Policies and Strategies

Uralla Shire Local Environmental Plan (LEP)

The Uralla Shire LEP outlines a framework to guide land use and development within the Shire, including provisions related to housing. The LEP seeks to balance growth with sustainability, ensuring that housing development meets the needs of current and future residents while preserving the character of the region. Key objectives of the LEP include:

- Facilitating housing supply and diversity: The LEP aims to support the development of a range of housing types to cater to various household needs and provide a range of settlement type options for residents.
- Protecting resource sectors: The LEP aims to protect significant agricultural land and natural resources including timber, minerals, soils, and water, encouraging development that is sensitive to the natural environment and that limits its impact on the natural ecosystem.
- Protecting heritage: Uralla Shire – particularly the township - has many buildings and places of heritage significance. The LEP encourages the protection and conservation of local heritage, limiting the ability for intensified housing development in some locations.

The LEP currently has no specific reference to temporary workers accommodation in the context that would be required to facilitate large-scale renewable energy projects.

Uralla Shire Development Control Plan (DCP)

The Uralla Shire Council Development Control Plan (DCP) provides a comprehensive framework for guiding development within the Shire, covering key areas such as housing, subdivision, commercial and industrial development, and renewable energy. It works alongside the Uralla LEP to ensure that developments align with local and state requirements, addressing a wide range of planning and environmental considerations.

For housing, the DCP includes controls on aspects such as density, site design, setbacks, and solar access. It promotes sustainable design, energy efficiency, and the preservation of local character, ensuring that new developments enhance community well-being and contribute to environmental sustainability.

The DCP establishes standards for large-scale renewable energy projects, aiming to facilitate responsible development in line with local planning and environmental objectives. The guidelines encourage the transition to clean energy while minimising environmental impacts and land-use conflicts, however there is no reference to other factors such as temporary workers accommodation that may result from large-scale renewable energy projects.

Uralla Shire Local Strategic Planning Statement

The Uralla Shire Local Strategic Planning Statement (LSPS) outlines a 20-year vision for the region, focusing on economic, social, and environmental land use needs. It emphasizes the importance of supporting and managing rural landscapes, promoting new industries, and enhancing liveability and

sustainability. Key objectives include facilitating housing to accommodate a growing and diverse population, including temporary workers for renewable energy projects, and supporting the development of renewable energy infrastructure.

The LSPS highlights the need for flexible land use planning to adapt to changing economic and climatic conditions, ensuring that agricultural land is protected while allowing for diversification into tourism and renewable energy. It also stresses the importance of providing adequate housing and infrastructure to support both permanent residents and temporary workers involved in large-scale renewable energy projects. The document sets out actions to identify and develop renewable energy clusters, protect important farmland, and ensure that infrastructure planning is coordinated with development needs to support sustainable growth.

Uralla Shire Community Strategic Plan 2022-2031

The Community Strategic Plan (CSP) sets a long-term vision for sustainable growth in Uralla, balancing economic development, community well-being, and environmental stewardship. The CSP recognises the importance of fostering both housing development and renewable energy to drive local prosperity.

Key objectives related to housing include maintaining a balance between development and environmental sustainability, with a focus on facilitating new dwellings and infrastructure improvements. There is an emphasis on ensuring housing affordability and availability as part of the community's broader strategic goals.

Renewable energy is a core focus, especially through the region's involvement in the New England REZ. The plan supports investment in renewable energy projects to attract industries, create jobs, and promote energy sustainability, helping Uralla transition toward a more environmentally responsible future.

Uralla Shire Development Contribution Plans

The Uralla Shire Development Contribution Plans (DCPs) provide frameworks for collecting developer contributions to fund infrastructure and public amenities within the local government area. The plans ensure that new developments contribute to the costs of infrastructure required to meet increased demand or mitigate impacts caused by development activities.

The Section 7.11 Development Contributions Plan (Heavy Haulage) focuses on developments generating heavy vehicle traffic, such as quarries and logistics facilities. It establishes a levy system based on tonnage and haulage distance to fund road maintenance and upgrades. This ensures that developments impacting council roads contribute to their upkeep and safety. Contributions may also include works-in-kind, such as road construction.

The Section 7.12 Development Contributions Plan (Fixed Levy) applies a fixed percentage levy on the cost of developments not covered by Section 7.11. It funds public amenities and infrastructure, including parks, public toilets, and open spaces. Levies range from 0.5% to 1% of the development cost, depending on the value of the project. This plan supports ongoing infrastructure improvements to enhance community well-being and service delivery.

Both plans aim to balance development with the sustainable provision of infrastructure and services, ensuring that contributions are fair, transparent, and aligned with the needs of the Uralla Shire community.

However, the Section 7.11 has a very narrow scope, focusing on roads impacted by heavy vehicles, and Section 7.12 on general amenities. Neither addresses equity issues in cost distribution for subdivisions,

where 'first movers' are disadvantaged with full upfront costs of infrastructure upgrades that would benefit neighbouring properties.

ZNET Uralla Initiative

The ZNET (Zero Net Energy Town) Initiative aims to make Uralla the first town in New South Wales to achieve zero net energy consumption. The project includes community-driven efforts such as energy audits, education programs, and support for local renewable energy projects. These initiatives encourage residents and businesses to adopt energy-efficient practices and renewable energy technologies, such as rooftop solar and battery storage systems, to reduce overall energy consumption and increase energy self-sufficiency.

Uralla Shire Renewable Energy Community Benefit Policy

This policy is focused on ensuring that local communities benefit directly from renewable energy projects. The policy framework mandates community consultations and equitable benefit-sharing models, such as local job creation, community funding for infrastructure projects, and educational programs. This policy supports local energy initiatives that align with the community's interests and sustainability goals. The policy includes a minimum community benefit threshold of $850 per MW per annum for solar energy development, and $1050 per MW per annum for wind energy development, paid over the life of the development and indexed to CPI. These monetary values align with those outlined in the NSW Government Benefit Sharing Guideline. The NSW Government guideline also includes a value for stand-alone battery energy storage systems of $150 per megawatt hour per annum, which is not included in Uralla's policy.

Regional Policies and Strategies

New England North West Regional Plan 2041

The New England North West Regional Plan 2041 is a comprehensive strategic document that outlines the vision and goals for the region's development over the next two decades. The plan covers 12 LGAs, including Uralla Shire, and aims to protect and enhance the region's assets while planning for a sustainable future.

Housing is a key priority in the plan, with a focus on addressing the region's housing needs through the planning system. The plan incorporates recommendations from the Regional Housing Taskforce, which was established to investigate how to better use the planning system to address housing needs. To further support this initiative, the New England North West Housing Affordability Roundtable is being established to improve housing affordability and diversity in the region.

Uralla is not a key focus area for the plan, though new housing development is supported throughout the Shire and appropriate renewable energy development is encouraged where they are compatible with the LGA's lifestyle and valued environmental assets.

Southern New England Regional Economic Development Strategy 2023 Update

The Southern New England High Country Regional Economic Development Strategy (REDS) outlines a vision for economic resilience and sustainable growth, with a focus on housing and renewable energy development. A key priority is addressing the region's housing shortages, particularly workforce housing, to support the large-scale projects associated with the renewable energy sector. The strategy aims to implement the forthcoming Regional Housing Delivery Plan to ensure housing needs are met for the influx of workers brought by projects like the New England REZ. Population growth is also

encouraged through investments in liveability and infrastructure, ensuring the region remains attractive to both residents and workers.

In terms of renewable energy, the New England REZ is central to the region's economic future, with over $10.7 billion in private investment anticipated. The strategy highlights the importance of managing the influx of workers and the associated infrastructure demands, ensuring that long-term benefits are delivered to the community beyond the initial construction phase. The REZ and other renewable energy projects are seen as key drivers for local economic growth, with a strong focus on connecting these developments to the local workforce and industries to foster greater resilience and opportunity in the region.

Regional Housing Taskforce Recommendations

The Regional Housing Taskforce, established by the NSW Government in 2021, plays a crucial role in addressing housing supply and affordability challenges in regional areas, including Uralla. The taskforce's recommendations and subsequent government responses are critical for guiding local housing strategies. Key initiatives include:

- Development-ready land: The taskforce emphasises the importance of making land development-ready to accelerate the supply of new housing. This involves streamlining planning processes and removing barriers to land development.
- Affordable and diverse housing: Increasing the availability of affordable and diverse housing types is a priority. The taskforce supports policies and funding that encourages the development of housing that meets the needs of various demographic groups, including Aboriginal people, low-income families, key workers, temporary workers, single parents, and older singles.
- Government investment: Significant funding has been allocated to support housing development, including a $33.8 million Regional Housing Development Program and up to $120 million for infrastructure under the Accelerated Infrastructure Fund. These investments aim to create the conditions necessary for the rapid development of new housing projects.

New England Renewable Energy Zone (REZ)

The New England REZ is part of a broader initiative by the NSW Government to establish several REZs across the state. These zones are designed to cluster renewable energy generation, transmission, and storage projects, facilitating economies of scale and streamlined project approvals. The New England REZ focuses on leveraging the region's abundant wind and solar resources, with the aim of supporting up to 8 GW of renewable energy generation. It also seeks to create jobs and stimulate economic development in the region.

State Policies and Strategies

NSW Housing Strategy (Housing 2041)

The NSW Housing Strategy 2041 outlines a comprehensive vision to address housing challenges over the next 20 years. It focuses on ensuring that housing meets the needs of all residents across their lifespans, supported by four key pillars: supply, diversity, affordability, and resilience.

- Long-term planning and action plans: The strategy incorporates long-term planning with regularly updated action plans to respond to emerging housing needs and challenges. This approach allows for flexibility and adaptability in addressing housing issues.

- Focus on social and affordable housing: The strategy underscores the importance of increasing the supply of social and affordable housing. Although it lacks specific funding commitments, it outlines a framework for leveraging government-owned land and collaborating with various stakeholders to meet these goals.

State Environmental Planning Policy (Housing) 2021

The Housing SEPP is designed to streamline the planning framework and enhance housing supply and diversity. It introduces new housing types and consolidates previous policies to simplify planning processes.

- Infill and build-to-rent housing: The SEPP encourages the development of infill and build-to-rent housing to provide affordable options in urban areas. This policy may be important for supporting housing affordability in regional towns like Uralla.

- Seniors and affordable housing: Specific provisions are made for seniors and affordable housing, ensuring that these groups have access to appropriate living arrangements. The policy also incentivises developers to include affordable housing in their projects.

Temporary and Seasonal Workers' Accommodation Draft Guideline (NSW) 2023

The Temporary and Seasonal Workers' Accommodation Draft Guideline is a NSW government initiative to address housing needs for temporary workers, particularly in regional areas. It aims to streamline the planning and approval process for worker accommodation.

- Planning framework: The guideline provides a standardised approach for local councils to assess and approve temporary worker housing projects, offering clarity on suitable locations, design standards, and operational requirements.

- Flexibility and efficiency: It allows for more flexible housing solutions, including the use of rural zones for temporary accommodation and the repurposing of existing buildings. This approach is designed to expedite the delivery of housing for workers in critical industries, such as renewable energy projects and agriculture.

- Community integration: The guideline emphasises the importance of integrating worker accommodation with local communities, considering factors such as infrastructure capacity and social impacts.

Councils are intended to implement temporary worker accommodation policies primarily through the Local Environmental Plan (LEP). Councils are also encouraged to integrate the demand for seasonal and temporary workers' accommodation into all future strategic planning processes, such as local housing strategies and rural land strategies.

NSW Electricity Infrastructure Roadmap

The NSW Electricity Infrastructure Roadmap is a comprehensive strategy aimed at transforming the state's energy system by developing renewable energy infrastructure, including wind, solar, and storage, to replace retiring coal-fired power stations. The roadmap outlines a plan to deliver 12 GW of renewable electricity capacity by 2030, supported by 2 GW of storage, such as batteries or pumped hydro, to ensure

grid reliability. The roadmap promotes private investment and aims to cut household electricity costs by leveraging the state's competitive renewable energy resources.

NSW Climate Change Policy Framework

This framework sets a long-term target for NSW to reach net-zero emissions by 2050. It supports various initiatives, including renewable energy adoption, improving energy efficiency in residential and commercial buildings, and investing in clean technologies. By incorporating climate considerations into planning and development processes, the framework seeks to drive economic growth while reducing greenhouse gas emissions.

NSW Electricity Strategy

The NSW Electricity Strategy aims to provide reliable, affordable, and sustainable energy to meet the state's growing demand. This strategy focuses on integrating renewable energy sources into the grid, modernising infrastructure, and ensuring a stable energy supply. The strategy promotes partnerships between government, industry, and local communities to drive renewable energy development and enhance energy security.

Draft Benefit Sharing Guideline (NSW) 2024

The Draft Benefit Sharing Guideline is a NSW government initiative focused on ensuring that communities hosting large-scale projects, particularly renewable energy developments, receive tangible benefits. It aims to create a framework for equitable distribution of project benefits and determine the appropriate payments which renewable energy developers should be making to the relevant local government.

EnergyCo

EnergyCo is responsible for planning and delivering REZs in NSW. It plays a key role in coordinating infrastructure development, engaging with local communities, and managing investments to ensure that the benefits of renewable energy projects are distributed locally. EnergyCo's efforts are integral to the successful implementation of REZs and achieving the state's renewable energy targets.

Electricity Infrastructure Jobs Advocate / NSW Renewable Energy Sector Board

These bodies are tasked with ensuring the use of local labour and materials in renewable energy projects. Their mandate includes developing a skilled workforce, promoting local businesses, and ensuring that the economic benefits of the transition to renewable energy are maximised for local communities. They focus on job creation, training, and apprenticeships to build a sustainable and skilled workforce to support the renewable energy sector.

National Policies and Strategies

National Housing Accord

The National Housing Accord is a collaborative effort involving multiple levels of government and the private sector to increase housing supply and affordability. With an aspirational target to build 1.2 million new homes over five years, the Accord aims to address the national housing shortage.

- Funding and incentives: The Accord includes substantial funding commitments, such as a $350 million investment for affordable housing and a $3 billion performance-based incentive

program for states and territories. These initiatives are designed to accelerate housing development and improve affordability.

- Planning reforms and institutional investment: The Accord promotes planning reforms and seeks to attract investment from institutional investors to support the development of affordable housing. These efforts are expected to create a more conducive environment for housing development nationwide.

National Housing and Homelessness Plan

The National Housing and Homelessness Plan outlines a comprehensive approach to addressing housing and homelessness issues across Australia. It focuses on improving access to secure and affordable housing while addressing homelessness through a collaborative and consultative process.

- Infrastructure and support for vulnerable groups: The plan includes significant investments in infrastructure and targeted support for vulnerable groups, including Aboriginal and Torres Strait Islander peoples. This approach aims to create inclusive housing solutions that cater to the needs of all Australians.

- Home ownership and renters' rights: Initiatives to improve renters' rights and expand eligibility for home ownership are central to the plan. These measures aim to enhance housing security and make home ownership more accessible for a broader range of Australians.

National Renewable Energy Target (RET)

The RET is a key policy supporting the development of the renewable energy sector in Australia. It requires energy retailers to source a certain percentage of electricity from renewable sources, providing a financial incentive for the development of renewable energy projects. The target aims to reduce greenhouse gas emissions, enhance energy security, and create jobs in the renewable energy sector. The RET has been instrumental in driving investment in wind and solar projects across the country.

Australian Energy Market Operator (AEMO) Integrated System Plan (ISP)

AEMO's Integrated System Plan (ISP) provides a long-term strategic plan for the development of Australia's electricity system. It outlines the necessary investments in generation, transmission, and storage to transition to a reliable, low-cost, and low-emission energy system. The ISP highlights the importance of integrating renewable energy sources, upgrading transmission infrastructure, and deploying energy storage solutions to maintain grid stability and reliability.

AEMO Electricity Statement of Opportunities (ESOO)

The AEMO Electricity Statement of Opportunity (ESOO) and Reliability Forecast Methodology are key documents that provide insights into the future of Australia's National Electricity Market (NEM). The 2024 ESOO offers a comprehensive assessment of the NEM's future electricity supply reliability, highlighting the ongoing transition from coal-fired generation to renewable energy sources. This transition presents an increased risk of supply shortfalls, particularly in New South Wales and Victoria, underscoring the need for significant investment in new generation, storage, and transmission infrastructure to maintain reliability. The reliability outlook presented in the ESOO identifies potential reliability gaps in multiple regions over the next decade, with New South Wales and Victoria facing the highest risks of unserved energy. To address these challenges, the report recommends accelerating the development of new generation and storage projects, enhancing transmission infrastructure to support renewable energy integration, and implementing demand-side measures to manage peak loads.

Appendix B – Housing market assessment

Sales data

Table 9 Median Sale Price – House (Calendar Year)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	$300,000	$230,000	$225,000	$320,000	$355,000	$290,000	$265,000	$306,000	$344,500	$406,500	$467,500	$492,500
Armidale Regional	$305,000	$320,000	$315,000	$339,500	$357,500	$338,500	$350,000	$345,000	$360,000	$399,000	$491,500	$474,000
Tamworth Regional	$272,000	$270,000	$285,000	$304,500	$320,000	$325,000	$340,000	$330,000	$345,000	$380,000	$450,000	$480,000
Walcha	$175,000	$215,000	$217,225	$232,500	$230,000	$247,500	$280,000	$226,250	$305,000	$317,500	$380,000	$367,500
Uralla Region	$280,000	$279,000	$290,000	$315,000	$330,000	$327,250	$336,750	$330,000	$350,000	$385,000	$462,000	$480,000

Source: REMPLAN Housing (derived from RPData)

Table 10 Count of Sales – House (Calendar Year)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	36	39	48	65	58	79	75	66	86	156	150	98
Armidale Regional	171	235	237	311	324	347	345	319	450	803	628	552
Tamworth Regional	480	577	672	760	819	859	879	770	1,130	1,695	1,393	1,219
Walcha	20	18	30	24	25	33	37	32	44	54	38	38
Uralla Region	707	869	987	1,160	1,226	1,318	1,336	1,187	1,710	2,708	2,209	1,907

Source: REMPLAN Housing (derived from RPData)

Table 11 Median Sale Price – Unit (Calendar Year)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	$295,000	-	$390,000	$245,000	-	$320,000	$260,000	$245,000	$300,000	$280,000	$515,000	-
Armidale Regional	$235,000	$298,500	$265,000	$247,000	$257,000	$250,000	$213,000	$267,500	$284,750	$290,000	$310,000	$350,000
Tamworth Regional	$205,500	$219,000	$198,750	$235,000	$232,000	$267,500	$235,000	$289,500	$227,000	$261,000	$338,000	$345,000
Walcha	-	-	-	$295,000	$372,500	$360,000	-	$83,000	$104,000	$97,000	-	$149,000
Uralla Region	$227,250	$252,000	$235,000	$239,000	$238,500	$261,500	$226,000	$280,000	$243,750	$283,750	$330,000	$347,500

Source: REMPLAN Housing (derived from RPData)

Table 12 Count of Sales –Unit (Calendar Year)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	2	-	2	4	-	1	2	2	1	4	3	-
Armidale Regional	18	35	41	48	47	43	38	48	40	119	85	81
Tamworth Regional	44	60	54	73	73	65	69	62	78	134	108	94
Walcha	-	-	-	1	2	1	-	1	1	1	-	1
Uralla Region	64	95	97	126	122	110	109	113	120	258	196	176

Source: REMPLAN Housing (derived from RPData)

Table 13 Median Sale Price – Land (Calendar Year)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	$107,000	$129,500	$20,220	$18,312	$117,500	$422,500	$290,000	$215,000	$400,000	$155,000	$275,000	$262,500
Armidale Regional	$156,500	$120,000	$21,224	$17,159	$189,000	$178,750	$290,000	$241,000	$244,500	$185,000	$200,000	$204,500
Tamworth Regional	$138,000	$149,500	$142,000	$132,500	$157,000	$170,000	$173,500	$150,000	$170,000	$175,000	$190,000	$220,000
Walcha	$9,637	$13,233	$13,446	$16,075	$8,100	$366,899	$662,500	$232,500	$307,500	$71,000	$110,000	$229,625
Uralla Region	$138,000	$140,000	$107,500	$102,500	$147,500	$177,000	$220,000	$175,000	$193,500	$175,000	$197,500	$220,000

Source: REMPLAN Housing (derived from RPData)

Table 14 Count of Sales –Land (Calendar Year)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	5	14	24	43	12	20	23	23	17	18	32	14
Armidale Regional	26	53	62	76	55	50	77	51	64	124	105	82
Tamworth Regional	100	94	130	132	97	106	125	99	153	304	239	137
Walcha	19	14	32	41	17	10	4	8	6	18	5	12
Uralla Region	150	175	248	292	181	186	229	181	240	464	381	245

Source: REMPLAN Housing (derived from RPData)

Rental data

Table 15 Median Rental Price – House (Calendar Year)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	$275	$220	$303	$275	$300	$298	$280	$325	$300	$330	$420	$400
Armidale Regional	$340	$330	$350	$340	$350	$340	$350	$350	$360	$380	$420	$423
Tamworth Regional	$320	$320	$325	$335	$335	$330	$340	$350	$350	$370	$400	$420
Walcha	-	$250	$215	$220	$230	$203	$260	$250	$285	$280	$350	$325
Uralla Region	$330	$320	$330	$330	$340	$330	$340	$350	$350	$370	$410	$420

Source: REMPLAN Housing (derived from RPData)

Table 16 Count of Listings –House (Calendar Year)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	6	5	16	29	25	28	14	27	34	34	41	55
Armidale Regional	67	83	68	140	201	199	179	195	328	330	456	916
Tamworth Regional	142	184	219	296	451	436	425	460	615	588	789	1,306
Walcha	-	1	4	6	2	2	5	1	2	5	1	6
Uralla Region	215	273	307	471	679	665	623	683	979	957	1,287	2,283

Source: REMPLAN Housing (derived from RPData)

Table 17 Median Rental Price – Unit (Calendar Year)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	-	$145	$250	$120	$270	$190	$200	$135	$200	$200	$300	$250
Armidale Regional	$220	$230	$265	$220	$250	$240	$250	$260	$270	$270	$300	$310
Tamworth Regional	$258	$250	$220	$240	$255	$240	$240	$250	$265	$290	$300	$330
Walcha	-	-	-	-	-	-	$220	-	-	-	-	-
Uralla Region	$250	$245	$240	$235	$250	$240	$245	$250	$265	$280	$300	$320

Source: REMPLAN Housing (derived from RPData)

Table 18 Count of Listings –Unit (Calendar Year)

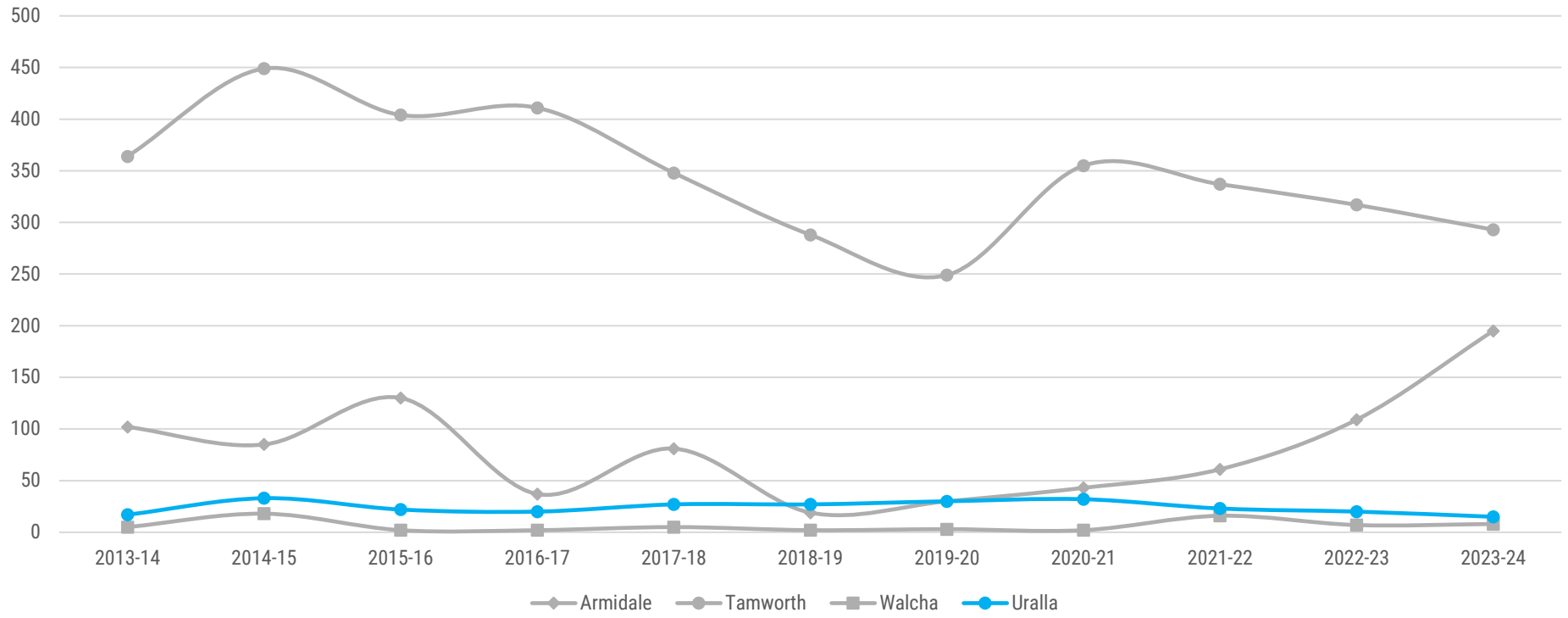
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Uralla	0	1	1	1	4	5	3	3	9	7	3	12
Armidale Regional	7	12	15	41	58	60	64	83	120	167	196	401
Tamworth Regional	22	33	37	59	83	73	77	103	175	156	229	348
Walcha	0	0	0	0	0	0	1	0	0	0	0	0
Uralla Region	29	46	53	101	145	138	145	189	304	330	428	761

Source: REMPLAN Housing (derived from RPData)

New dwelling approvals

	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Armidale	102	85	130	37	81	19	30	43	61	109	195
Tamworth	364	449	404	411	348	288	249	355	337	317	293
Uralla	17	33	22	20	27	27	30	32	23	20	15
Walcha	5	18	2	2	5	2	3	2	16	7	8
Total	**488**	**585**	**558**	**470**	**461**	**336**	**312**	**432**	**437**	**453**	**511**

Source: (ABS, Building Approvals, Australia)



Appendix C – Historic Population Trends

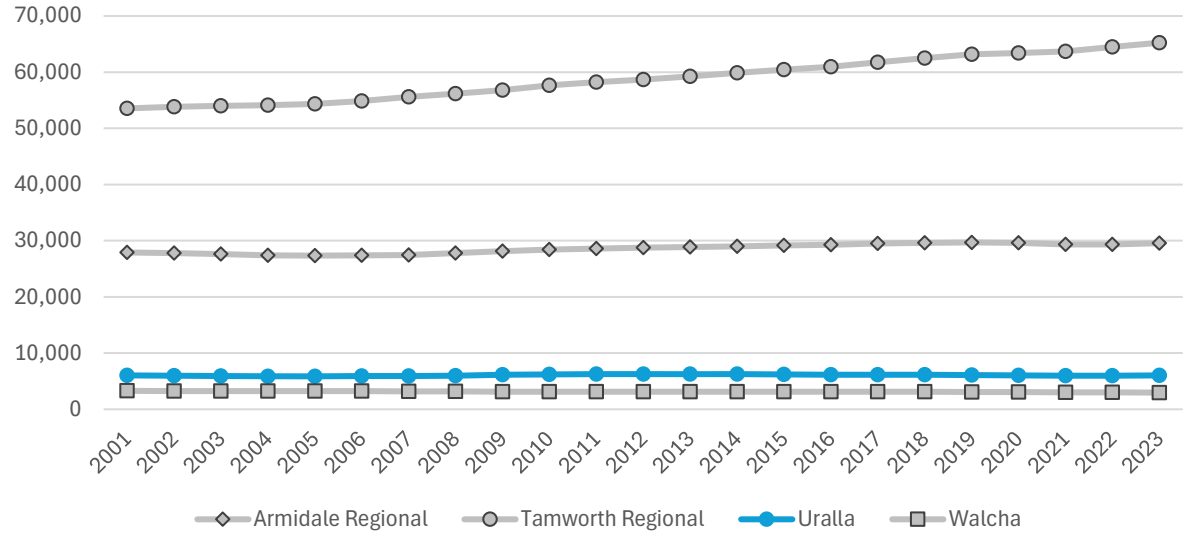


Figure 49 Estimated Residential Population (Source: ABS Regional Population)

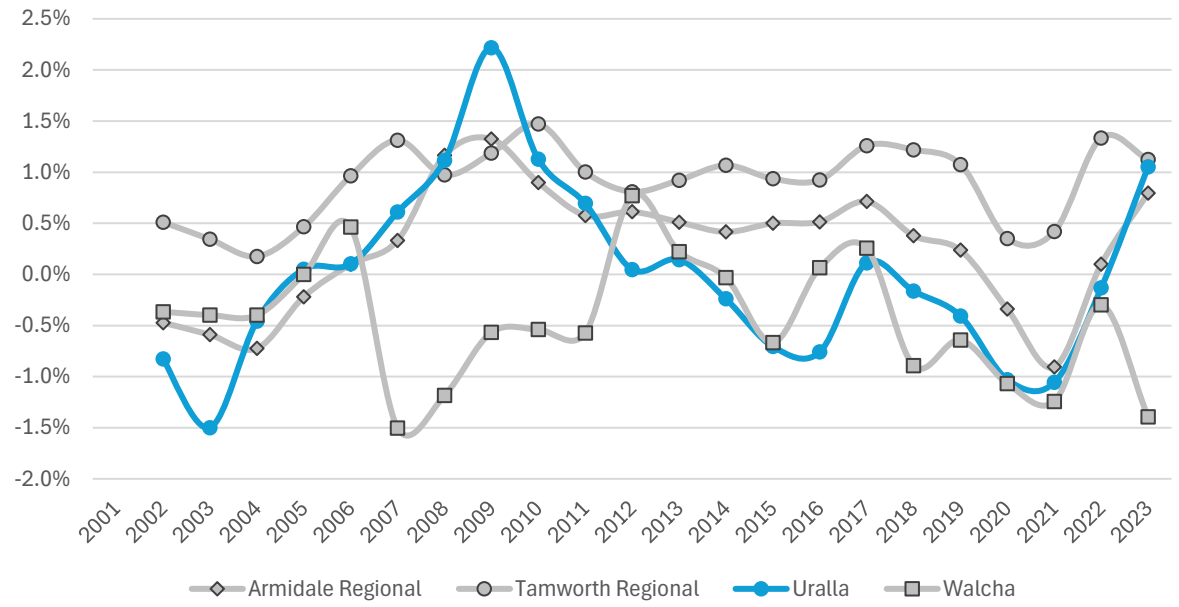


Figure 50 Estimated Residential Population annual growth rates (Source: ABS Regional Population)

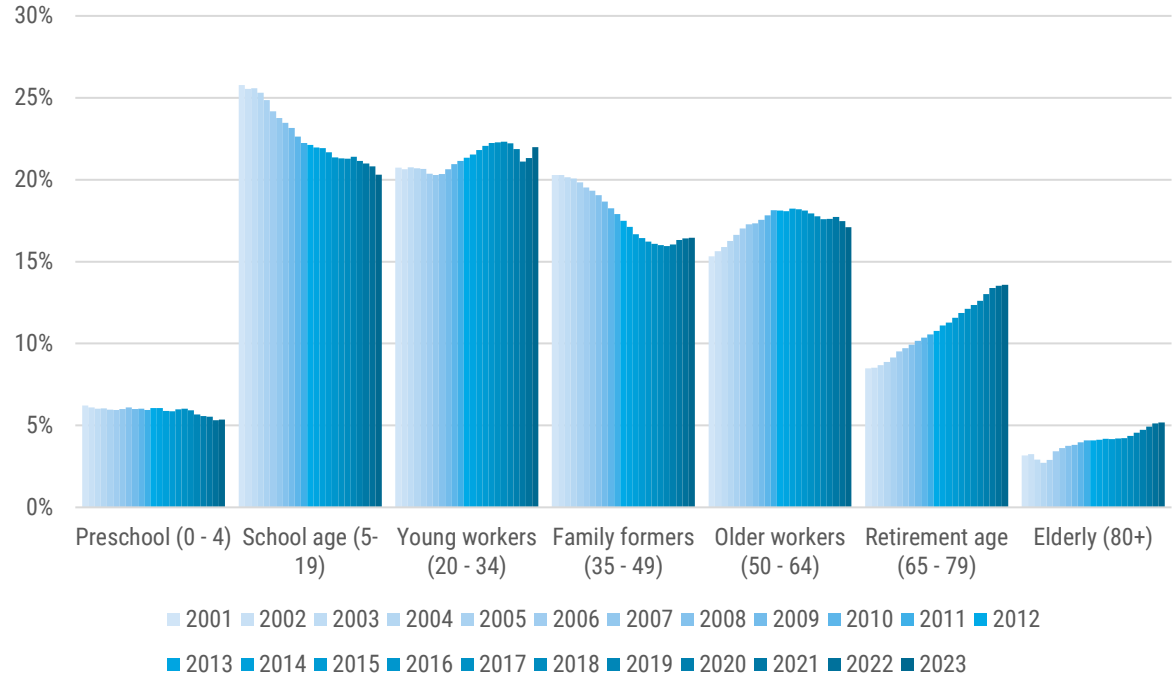


Figure 51 Population age profile, Armidale Regional (Source: ABS Regional Population)

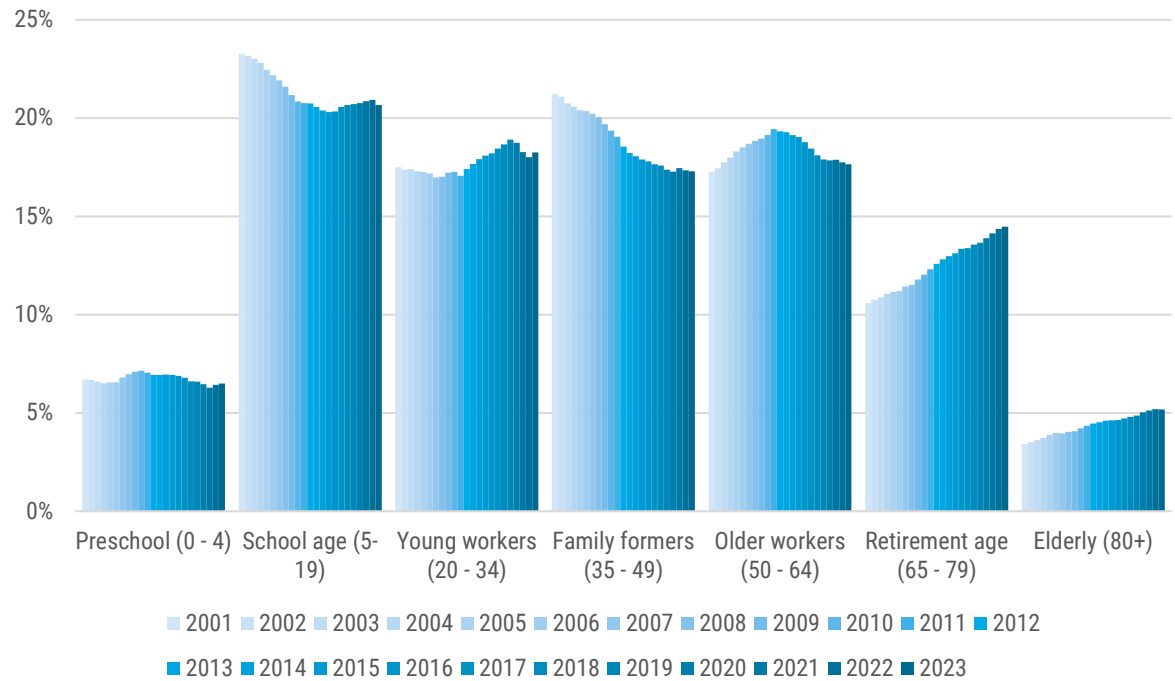


Figure 52 Population age profile, Tamworth Regional (Source: ABS Regional Population)

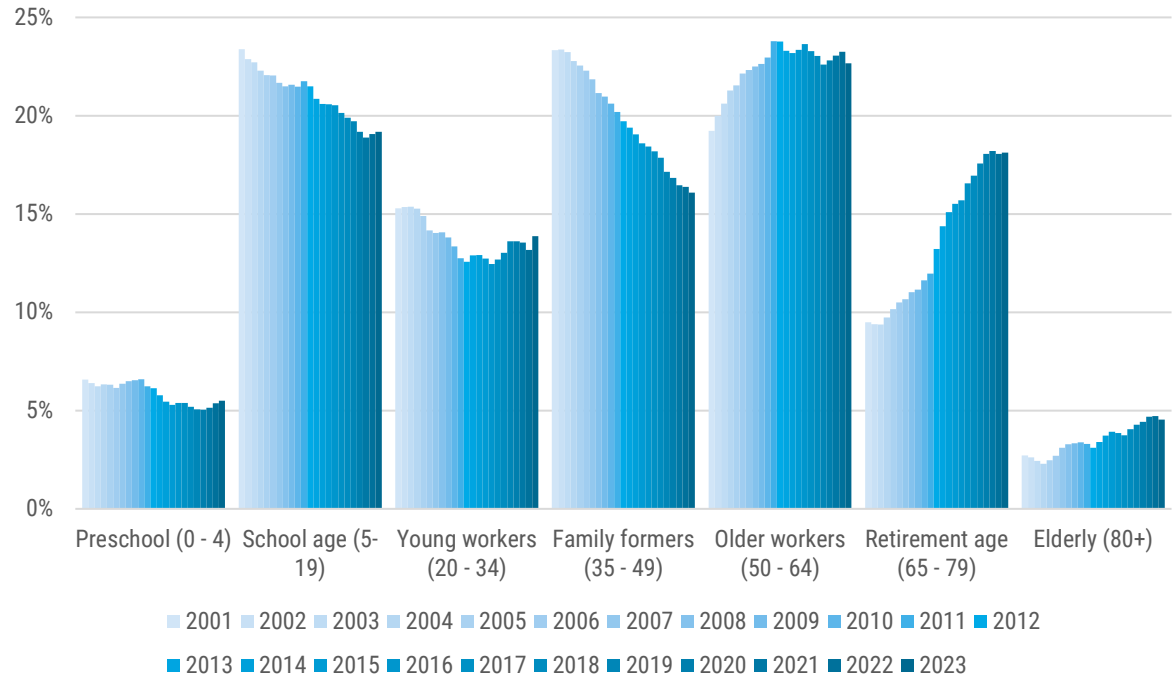


Figure 53 Population age profile, Uralla (Source: ABS Regional Population)

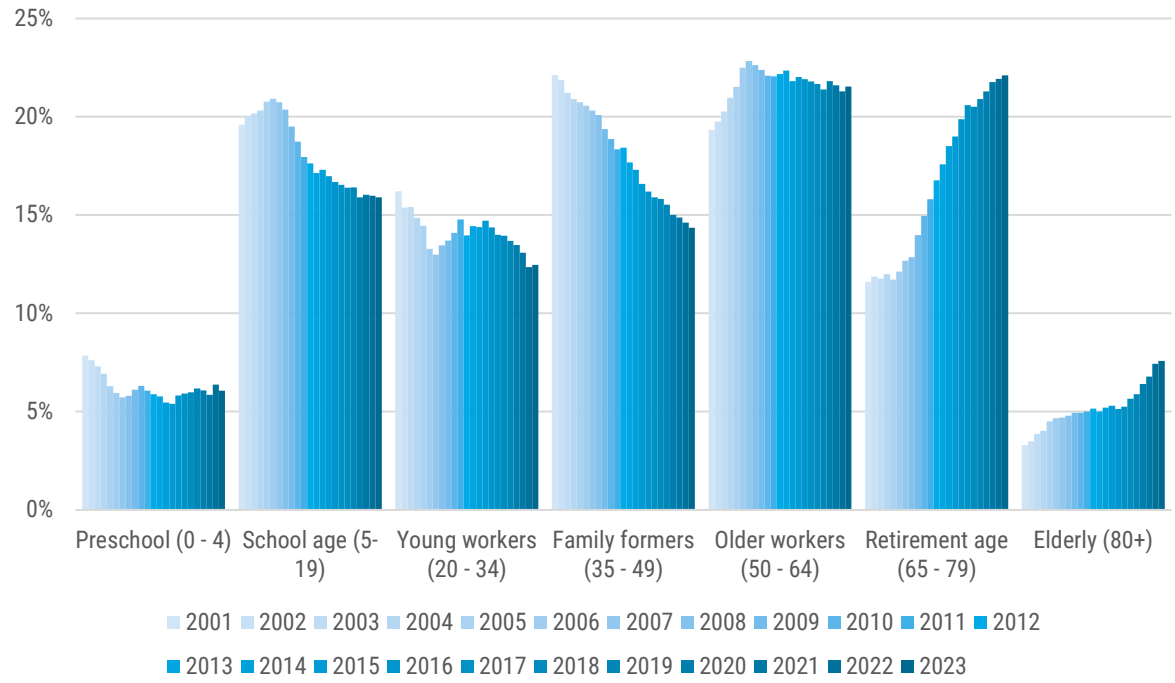
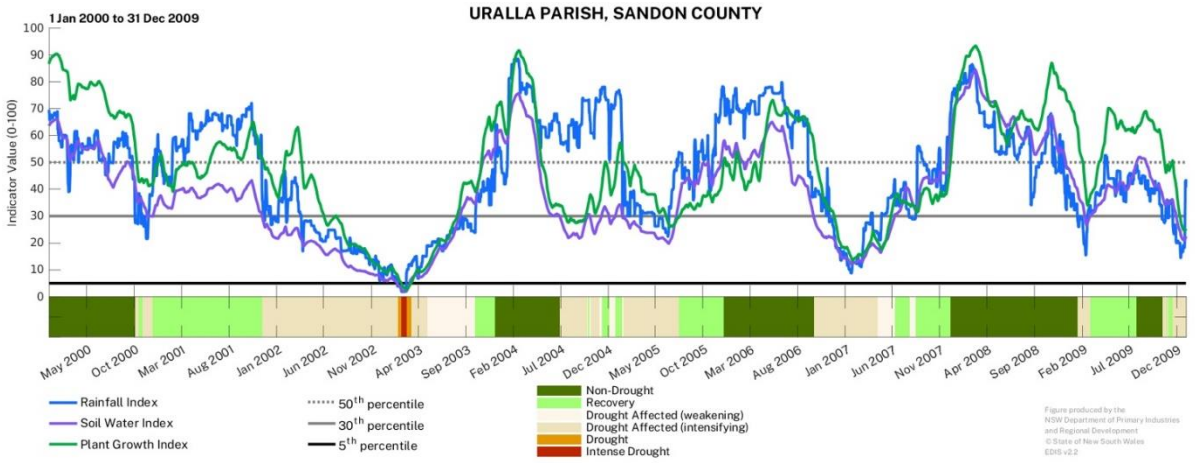
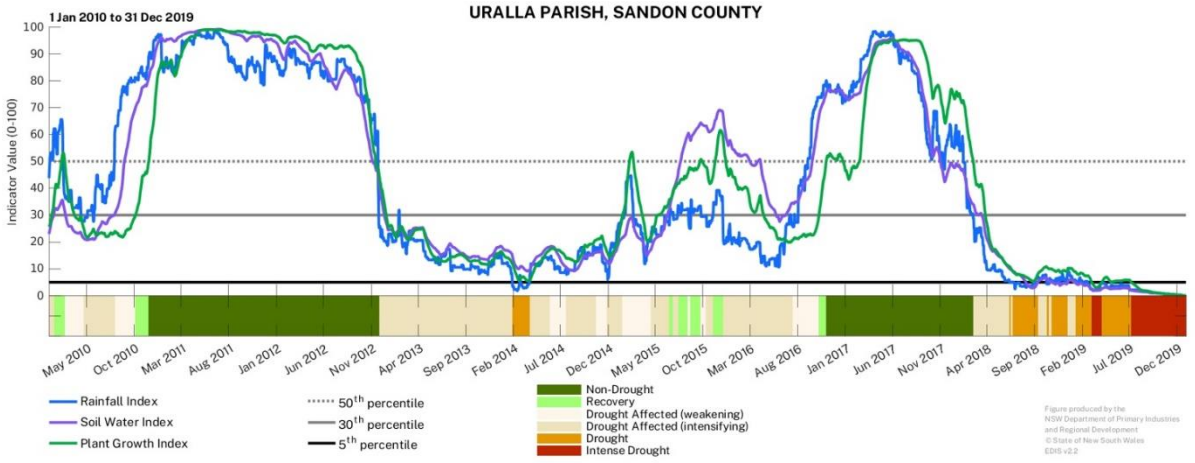
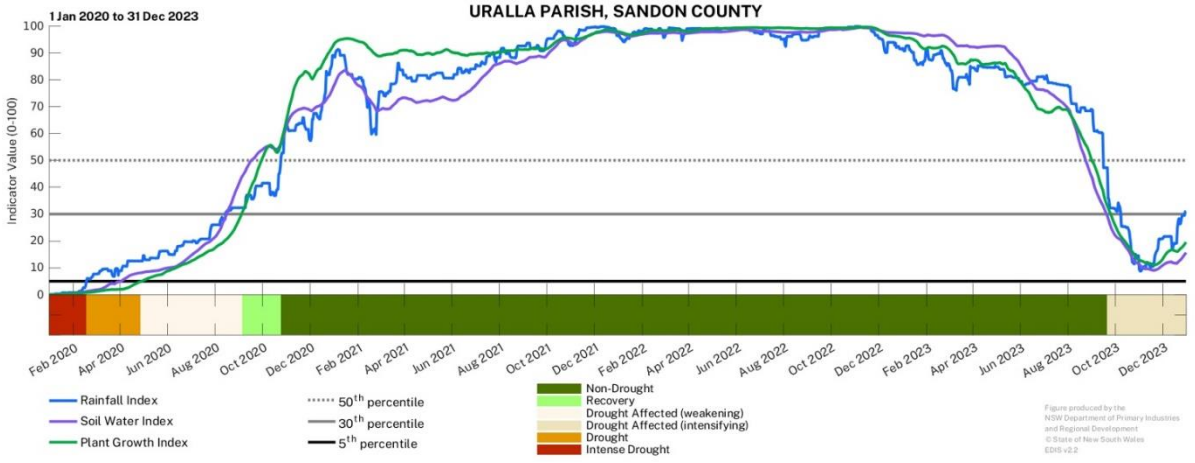


Figure 54 Population age profile, Walcha (Source: ABS Regional Population)



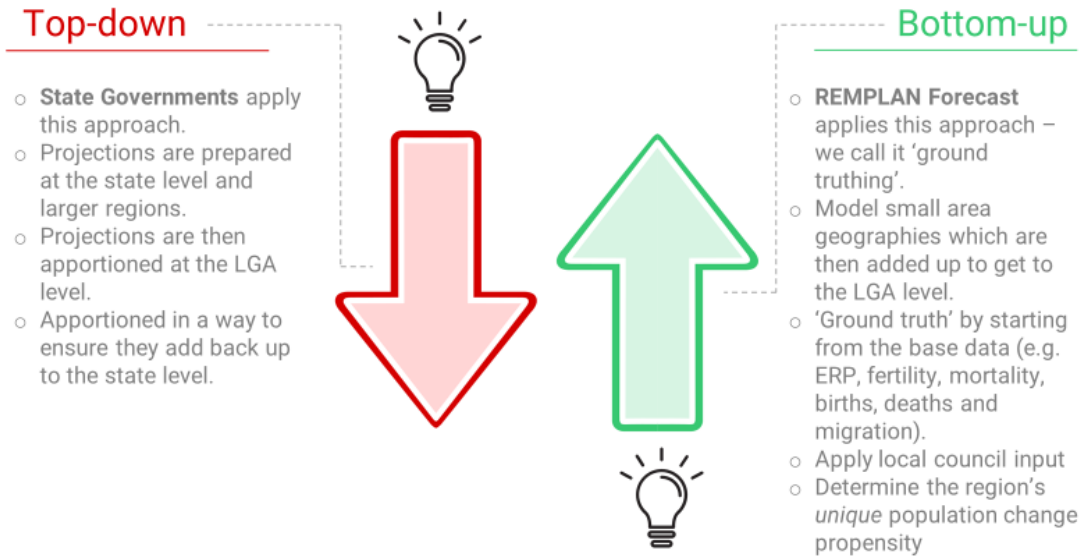




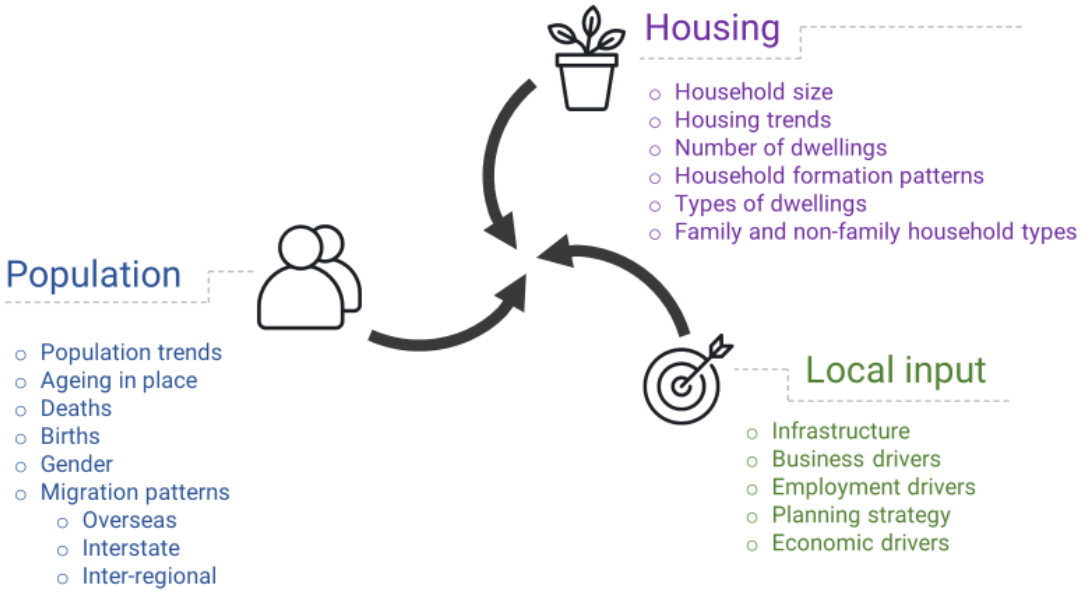
Source: NSW Department of Primary Industries (edis.spaceport.intersect.org.au)

Appendix D – Forecast Methodology

Conventional state-wide forecasts are reliant on top-down approaches which do not explicitly consider the unique factors that may apply at smaller scales – such as the unique position that Uralla holds in a central location within the New England REZ.



Data Drivers and Inputs



Population

Modelling of the underlying drivers of population change including fertility rates (births), mortality rates (deaths) and net migration (moving), are undertaken individually using age and gender specific models.

The models are estimated separately for females and males by single year of age, this method captures the full dynamism of the evolving demography of the region.

The population base considers:

- Demographic trend data in REMPLAN Community (which includes Census years 1991 to 2021).
- Trend Estimated Resident Population (ERP) figures with extended history from 2002 to latest year of release
- Official State Government Population forecasts (for benchmarking purposes)
- Census migration data: this provides an understanding of residents leaving the area as well as moving to the region between the 2006 and 2021 census periods – by single year age cohort
- Trend data for birth rates, fertility rates, death rates,
- Migration data - Net migration is just one component of the cohort component population model, however for a lot of regions, it is the component that drives the majority of the change in the overall population.

This data is essential to understand the demographic drivers of change for input to the population modelling.

Household formations

Population change is combined with understanding the household formations that are specific to that geography i.e., lone persons households, couples only, families, etc and this is then overlaid with identified future land supply in the region.

Land Supply

Understanding potential future supply within the region: urban growth areas; infill development; rural residential; and the timing of this supply of when it can be brought to the market to accommodate any future population is a fundamental input to the model.

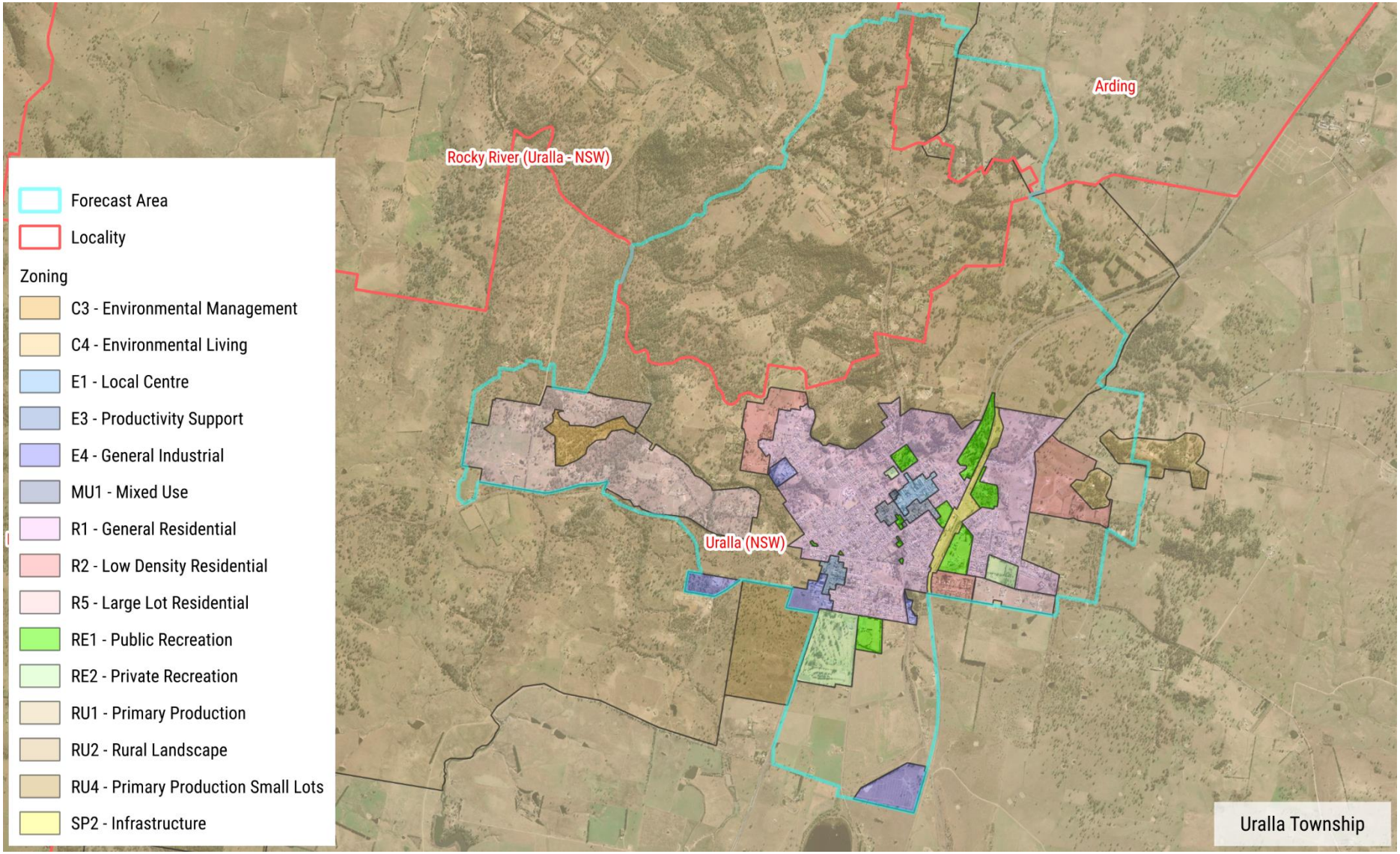
Dwelling approvals, commencements, construction certificates

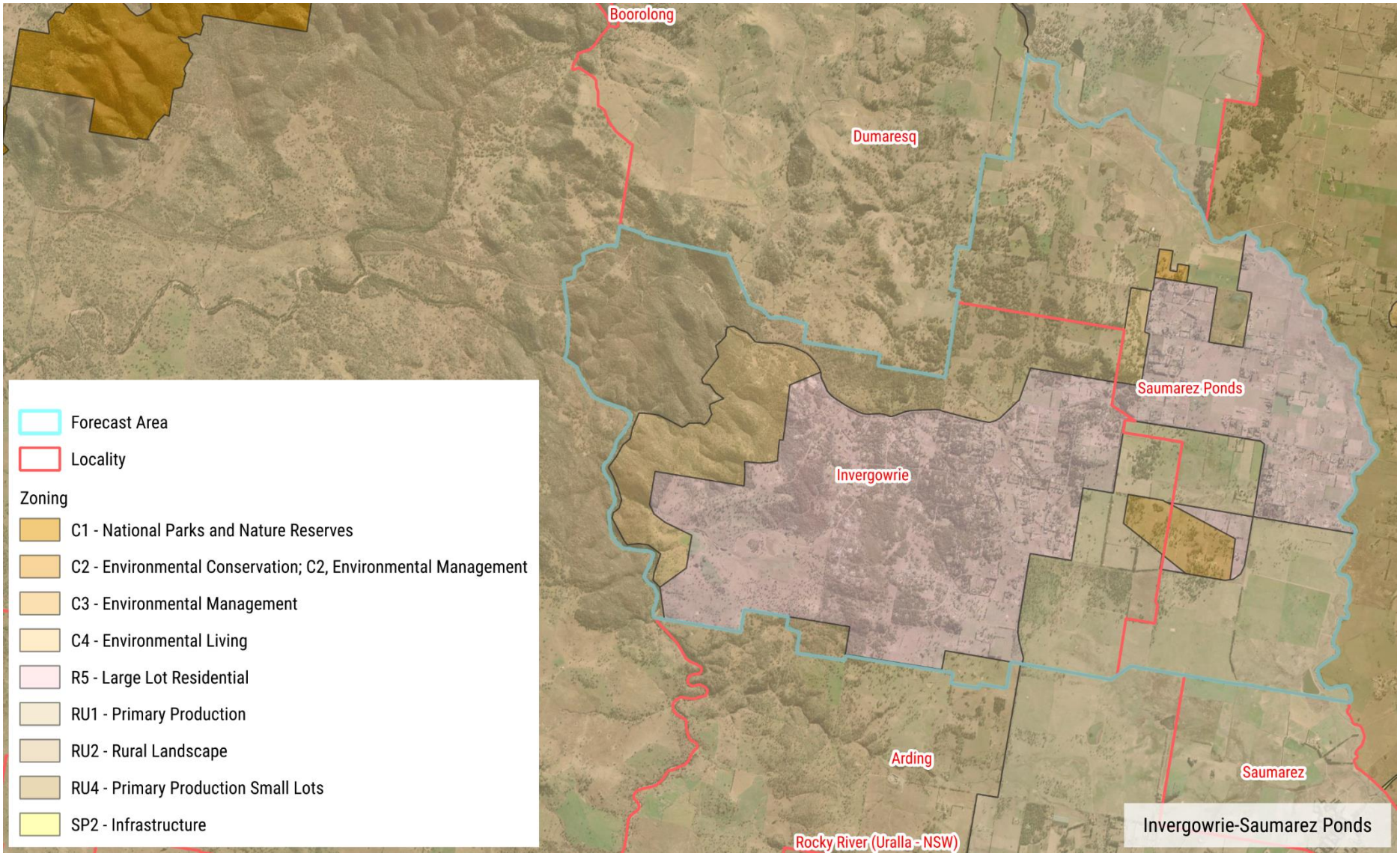
Understanding the historic dwelling data is a key underlying driver of the modelling process. Dwelling data is analysed as well as major development activities in the pipeline.

Localised Input

Localised input, such as business and employment drivers, local planning strategies and infrastructure also influence population growth in a region. The impact of the COVID-19 pandemic and implications for migration are also captured within the REMPLAN Forecasts.

Appendix E – Forecast area maps




Boorolong
Dumaresq
Saumarez Ponds
Invergowrie
Arding
Saumarez
Rocky River (Uralla - NSW)
Forecast Area
Locality
Zoning
C1 - National Parks and Nature Reserves
C2 - Environmental Conservation; C2, Environmental Management
C3 - Environmental Management
C4 - Environmental Living
R5 - Large Lot Residential
RU1 - Primary Production
RU2 - Rural Landscape
RU4 - Primary Production Small Lots
SP2 - Infrastructure
Invergowrie-Saumarez Ponds


Bundarra
Locality
Zoning
R2 - Low Density Residential
RU1 - Primary Production
RU5 - Village
Uralla Balance (Bundarra)

Appendix F – Base case forecast data tables

Age / life stage

Uralla LGA

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Preschool (0-4)	325	328	329	328	327	322	317	311	310	310	301	302	300	297	299	296	300	296	288	285	292	286	279	272
School age (5-19)	1,143	1,116	1,100	1,088	1,062	1,050	1,044	1,035	1,029	1,022	1,019	1,007	992	990	991	986	972	975	977	976	969	958	962	966
Young workers (20-34)	791	781	762	754	751	750	747	740	732	730	734	734	737	743	718	718	712	711	704	709	700	697	694	699
Family formers (35-49)	968	964	967	958	954	942	950	944	934	931	934	931	931	915	920	914	920	910	901	898	898	911	901	903
Older workers (50-64)	1,410	1,415	1,413	1,418	1,412	1,415	1,405	1,430	1,455	1,463	1,442	1,448	1,444	1,451	1,439	1,434	1,426	1,434	1,436	1,419	1,404	1,407	1,409	1,416
Retirement age (65-79)	1,119	1,147	1,163	1,174	1,202	1,219	1,227	1,221	1,212	1,209	1,222	1,224	1,238	1,244	1,265	1,279	1,280	1,289	1,293	1,302	1,315	1,324	1,331	1,341
Elderly (80+)	291	303	319	336	343	357	374	387	397	411	423	431	434	438	452	455	471	471	486	499	512	510	522	514
Total	6,047	6,054	6,053	6,056	6,051	6,055	6,064	6,068	6,069	6,076	6,075	6,077	6,076	6,078	6,084	6,082	6,081	6,086	6,085	6,088	6,090	6,093	6,098	6,111

Uralla Township

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Preschool (0-4)	157	142	125	110	101	90	87	82	84	87	83	88	89	89	89	88	91	92	90	86	90	85	84	80
School age (5-19)	501	507	517	526	519	514	501	495	484	479	474	468	464	463	458	450	444	445	448	450	446	444	440	439
Young workers (20-34)	368	357	349	353	361	366	371	371	367	365	372	375	377	378	371	369	368	366	362	360	362	370	372	372
Family formers (35-49)	457	451	447	435	425	413	407	402	396	393	388	376	376	375	381	384	386	384	382	380	379	379	378	381
Older workers (50-64)	566	578	585	586	590	602	598	606	618	617	612	623	621	628	627	628	622	622	620	620	609	609	604	609
Retirement age (65-79)	525	531	534	540	546	552	563	572	570	572	585	579	581	579	585	591	593	601	600	606	613	608	614	627
Elderly (80+)	141	152	160	165	171	178	192	195	204	212	215	223	229	229	233	238	248	246	257	260	267	276	283	276
Total	2,715	2,718	2,717	2,715	2,713	2,715	2,719	2,723	2,723	2,725	2,729	2,732	2,737	2,741	2,744	2,748	2,752	2,756	2,759	2,762	2,766	2,771	2,775	2,784

Invergowrie-Saumarez Ponds

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Preschool (0-4)	56	66	74	80	85	91	92	96	94	93	89	86	85	84	87	90	96	95	92	91	89	84	81	79
School age (5-19)	264	250	237	224	210	202	199	198	199	201	202	198	196	199	202	201	197	198	198	197	198	197	205	206
Young workers (20-34)	143	145	150	154	152	152	151	147	148	146	148	147	152	156	153	151	145	144	141	149	144	139	135	136
Family formers (35-49)	212	205	196	191	192	185	191	191	193	197	199	206	204	199	200	198	203	202	198	193	196	202	200	196
Older workers (50-64)	291	289	289	299	304	309	309	313	314	315	306	296	290	286	277	272	267	269	272	260	267	263	267	277
Retirement age (65-79)	202	212	218	215	216	217	217	213	214	214	220	232	239	241	243	248	248	250	263	272	270	280	279	274
Elderly (80+)	49	54	58	63	67	73	75	78	76	77	80	81	82	85	91	91	94	93	87	89	88	87	87	89
Total	1,217	1,221	1,222	1,226	1,226	1,229	1,234	1,236	1,238	1,243	1,244	1,246	1,248	1,250	1,253	1,251	1,250	1,251	1,251	1,251	1,252	1,252	1,254	1,257

Uralla Balance

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Preschool (0-4)	112	120	130	138	141	141	138	133	132	130	129	128	126	124	123	118	113	109	106	108	113	117	114	113
School age (5-19)	378	359	346	338	333	334	344	342	346	342	343	341	332	328	331	335	331	332	331	329	325	317	317	321
Young workers (20-34)	280	279	263	247	238	232	225	222	217	219	214	212	208	209	194	198	199	201	201	200	194	188	187	191
Family formers (35-49)	299	308	324	332	337	344	352	351	345	341	347	349	351	341	339	332	331	324	321	325	323	330	323	326
Older workers (50-64)	553	548	539	533	518	504	498	511	523	531	524	529	533	537	535	534	537	543	544	539	528	535	538	530
Retirement age (65-79)	392	404	411	419	440	450	447	436	428	423	417	413	418	424	437	440	439	438	430	424	432	436	438	440
Elderly (80+)	101	97	101	108	105	106	107	114	117	122	128	127	123	124	128	126	129	132	142	150	157	147	152	149
Total	2,115	2,115	2,114	2,115	2,112	2,111	2,111	2,109	2,108	2,108	2,102	2,099	2,091	2,087	2,087	2,083	2,079	2,079	2,075	2,075	2,072	2,070	2,069	2,070

Households

Uralla LGA

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Couple family with children	623	617	611	610	606	605	601	607	603	600	601	602	602	599	599	596	603	602	601	594	601	599	600	602
Couple family with no children	848	857	869	873	881	888	894	896	903	909	915	917	919	929	932	940	937	944	951	955	957	960	964	967
One parent family	277	275	275	276	277	277	278	278	279	285	284	286	288	285	286	287	287	289	290	290	292	292	294	295
Other family	23	24	23	24	25	24	24	23	25	24	26	22	25	25	27	24	25	25	25	26	24	26	24	25
Lone person household	653	663	669	676	684	692	701	705	711	715	720	729	731	737	740	749	754	755	759	769	771	777	783	785
Group household	55	54	55	55	54	54	55	57	56	55	55	54	57	56	57	57	57	56	55	58	57	56	57	57
Multiple family	54	55	55	55	54	54	54	53	54	55	53	55	54	56	57	55	55	57	57	56	56	58	56	57
Total	2,533	2,545	2,557	2,569	2,581	2,594	2,607	2,619	2,631	2,643	2,654	2,665	2,676	2,687	2,698	2,708	2,718	2,728	2,738	2,748	2,758	2,768	2,778	2,788

Uralla Township

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Couple family with children	157	142	125	110	101	90	87	82	84	87	83	88	89	89	89	88	91	92	90	86	90	85	84	80
Couple family with no children	501	507	517	526	519	514	501	495	484	479	474	468	464	463	458	450	444	445	448	450	446	444	440	439
One parent family	368	357	349	353	361	366	371	371	367	365	372	375	377	378	371	369	368	366	362	360	362	370	372	372
Other family	457	451	447	435	425	413	407	402	396	393	388	376	376	375	381	384	386	384	382	380	379	379	378	381
Lone person household	566	578	585	586	590	602	598	606	618	617	612	623	621	628	627	628	622	622	620	620	609	609	604	609
Group household	525	531	534	540	546	552	563	572	570	572	585	579	581	579	585	591	593	601	600	606	613	608	614	627
Multiple family	141	152	160	165	171	178	192	195	204	212	215	223	229	229	233	238	248	246	257	260	267	276	283	276
Total	2,715	2,718	2,717	2,715	2,713	2,715	2,719	2,723	2,723	2,725	2,729	2,732	2,737	2,741	2,744	2,748	2,752	2,756	2,759	2,762	2,766	2,771	2,775	2,784

Invergowrie-Saumarez Ponds

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Couple family with children	56	66	74	80	85	91	92	96	94	93	89	86	85	84	87	90	96	95	92	91	89	84	81	79
Couple family with no children	264	250	237	224	210	202	199	198	199	201	202	198	196	199	202	201	197	198	198	197	198	197	205	206
One parent family	143	145	150	154	152	152	151	147	148	146	148	147	152	156	153	151	145	144	141	149	144	139	135	136
Other family	212	205	196	191	192	185	191	191	193	197	199	206	204	199	200	198	203	202	198	193	196	202	200	196
Lone person household	291	289	289	299	304	309	309	313	314	315	306	296	290	286	277	272	267	269	272	260	267	263	267	277
Group household	202	212	218	215	216	217	217	213	214	214	220	232	239	241	243	248	248	250	263	272	270	280	279	274
Multiple family	49	54	58	63	67	73	75	78	76	77	80	81	82	85	91	91	94	93	87	89	88	87	87	89
Total	1,217	1,221	1,222	1,226	1,226	1,229	1,234	1,236	1,238	1,243	1,244	1,246	1,248	1,250	1,253	1,251	1,250	1,251	1,251	1,251	1,252	1,252	1,254	1,257

Uralla Balance

	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Couple family with children	112	120	130	138	141	141	138	133	132	130	129	128	126	124	123	118	113	109	106	108	113	117	114	113
Couple family with no children	378	359	346	338	333	334	344	342	346	342	343	341	332	328	331	335	331	332	331	329	325	317	317	321
One parent family	280	279	263	247	238	232	225	222	217	219	214	212	208	209	194	198	199	201	201	200	194	188	187	191
Other family	299	308	324	332	337	344	352	351	345	341	347	349	351	341	339	332	331	324	321	325	323	330	323	326
Lone person household	553	548	539	533	518	504	498	511	523	531	524	529	533	537	535	534	537	543	544	539	528	535	538	530
Group household	392	404	411	419	440	450	447	436	428	423	417	413	418	424	437	440	439	438	430	424	432	436	438	440
Multiple family	101	97	101	108	105	106	107	114	117	122	128	127	123	124	128	126	129	132	142	150	157	147	152	149
Total	2,115	2,115	2,114	2,115	2,112	2,111	2,111	2,109	2,108	2,108	2,102	2,099	2,091	2,087	2,087	2,083	2,079	2,079	2,075	2,075	2,072	2,070	2,069	2,070

Appendix G – Household composition comparison

Data in the tables below is derived from the 2021 Census of Population and Housing and counts the number of persons (place of enumeration), family household composition (dwellings), in five-year age groups. Data only includes persons counted in occupied private dwellings.

"Other family and multifamily" includes several categories of: 'one family household: other family', all two family households, and all three or more family households.

Table 19 Household formation by age, Rest of NSW GCCSA

HH comp↓ Age →	0-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85-89	90-94	95-99	100+
Couple without children	1%	1%	0%	3%	18%	28%	20%	10%	8%	12%	23%	39%	50%	56%	59%	57%	50%	40%	29%	19%	19%
Couple with children	77%	74%	71%	64%	39%	33%	50%	63%	64%	57%	44%	27%	15%	10%	7%	6%	5%	5%	4%	4%	4%
One parent	15%	21%	24%	25%	17%	12%	11%	12%	14%	15%	13%	10%	7%	5%	4%	4%	6%	9%	12%	17%	24%
Other family and multi family	6%	4%	4%	5%	8%	7%	5%	4%	4%	4%	4%	5%	5%	4%	4%	3%	3%	3%	3%	3%	2%
Lone person	1%	1%	1%	2%	7%	9%	8%	8%	8%	10%	13%	17%	20%	22%	24%	27%	34%	43%	51%	55%	48%
Group	0%	0%	0%	2%	12%	10%	5%	3%	2%	2%	3%	3%	3%	3%	3%	2%	2%	1%	1%	2%	3%

Table 20 Household formation by age, Uralla

HH comp↓ Age →	0-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85-89	90-94	95-99	100+
Couple without children	1%	1%	0%	3%	18%	28%	20%	10%	8%	12%	23%	39%	50%	56%	59%	57%	50%	40%	29%	19%	19%
Couple with children	77%	74%	71%	64%	39%	33%	50%	63%	64%	57%	44%	27%	15%	10%	7%	6%	5%	5%	4%	4%	4%
One parent	15%	21%	24%	25%	17%	12%	11%	12%	14%	15%	13%	10%	7%	5%	4%	4%	6%	9%	12%	17%	24%
Other family and multi family	6%	4%	4%	5%	8%	7%	5%	4%	4%	4%	4%	5%	5%	4%	4%	3%	3%	3%	3%	3%	2%
Lone person	1%	1%	1%	2%	7%	9%	8%	8%	8%	10%	13%	17%	20%	22%	24%	27%	34%	43%	51%	55%	48%
Group	0%	0%	0%	2%	12%	10%	5%	3%	2%	2%	3%	3%	3%	3%	3%	2%	2%	1%	1%	2%	3%

Appendix H – Growth scenario project details

Projects list	Type	Construction Workforce	Operational Workforce	Commencement	Construction Duration	Operational commencement	Uralla Share of jobs	Weighted const. jobs	Weighted oper. jobs
Eathorpe BESS	Battery	100	3	2026	1 year	2027	10%	10	0
Armidale BESS	Battery	80	10	2025	1 year	2026	10%	8	1
Armidale East BESS	Battery	70	5	2026	1 year	2027	10%	7	1
Gara BESS	Battery	70	5	2026	1 year	2027	10%	7	1
Eastern Hub Firming Battery	Battery	183	10	2028	1 year	2029	90%	165	9
New England Solar Farm (Stage 2)	Solar	700	15	2027	2 years	2029	90%	630	14
Tilbuster Solar Farm	Solar	125	5	2030	2 years	2032	10%	13	1
Tilbuster 2 Solar Farm	Solar	125	5	2033	2 years	2035	10%	13	1
Oxley Solar Farm	Solar	300	5	2030	2 years	2032	10%	30	1
Deeargee Solar Farm	Solar	400	10	2037	2 years	2039	90%	360	9
Hillview Solar Farm	Solar	300	15	2040	2 years	2042	90%	270	14
Thunderbolt Wind Farm	Wind	350	10	2027	3 years	2030	90%	315	9
Winterbourne Wind Farm	Wind	300	16	2031	3 years	2034	90%	270	14
Bendemeer Solar Farm	Solar	250	15	2033	3 years	2036	50%	125	8
New England REZ Transmission Project	Transmission	600	0	2027	6 years	2033	100%	600	0
TOTALS		**3,953**	**129**					**2,823**	**83**

Appendix I – Land Supply Approach

There are two models that underpin the land supply estimates, an existing dwelling count model and an estimated yield model. As the name suggests, these are models which use historic data as well as local input from Council to make informed estimates of potential supply. Detailed site assessments that would be completed as part of a development application process has not been undertaken.

Dwelling count model

The dwelling model provides a current estimate of the number of dwellings across the LGA. Dwelling estimates are calculated at a property level using a combination of G-NAF data, Council's rates database, the current NSW Land Parcel Property Theme spatial dataset and occupation certificate data from the NSW Planning Portal OC database.

The dwelling count model uses NSW Land Parcel Property Theme spatial dataset as a base and applies a sequential process of data matching to identify the land use of specific properties (e.g. vacant residential, occupied residential, business, farmland, etc) resulting in a final dwelling count. A final desktop review of the outputs, focussing on the unmatched properties, is undertaken.

The process can be summarised as:

- Matching properties in the NSW Land Parcel Property Theme spatial dataset with Council's rates database using the unique PID.
- Where there is no PID match, the model then matches properties using addresses. This further refines the matched records.
- The NSW Planning Portal OC database is run through the model to identify any properties which have recently had a structure completed. Where this contradicts Council's rates database (e.g. rates identifies a vacant property but an occupation certificate has been issued), the status is overridden.
- The final step is a manual assessment of the remaining unmatched properties in residential zones. A manual check of all other properties in residential zones is also completed. This review is completed through visual inspections of aerial imagery and searches of property industry databases such as RP Data.

Outputs of the dwelling count model are used as an input into the yield model, specifically to identify properties with a single dwelling that could be potentially classified as underutilised.

Yield model

The yield model estimates the potential number of dwellings that could developed across the LGA and only applies to existing residentially zoned land.

The yield model uses a four-stage approach where yields are calculated at each stage are progressively refined, with results from later stages overwriting earlier stages when applicable.

First Stage:

The first stage incorporates results from the dwelling count model to identify the status of each property, as vacant, occupied, or underutilised. Properties not within the residential zones are classified as unavailable.

In the first stage, the model calculates a median lot size using the NSW Land Parcel Property Theme – Lot spatial dataset by analysing historical lot sizes from the past five years for each unique combination of residential zone and suburb, ensuring alignment with recent development trends. If an inadequate number of records are available from the last 5 years for a specific suburb, data from

neighbouring areas are utilised to derive the output, accounting for the limited historical activity in the area.

Mapped constraints are overlaid on properties which impact development potential of larger subdividable properties. This ensures that a large property which is heavily constrained by flooding, for example, has a smaller developable area and a reduced yield. After accounting for applicable constraints and standard development takeout rates the subdividable area is divided by the median lot size. The yield for vacant properties is the resulting calculated value. The yield results for underutilised properties is reduced by 1 to account for the existing dwelling.

Second Stage (not applicable for Uralla Shire):

The second stage applies only for areas with high density or medium density residential areas, neither of which are present in Uralla Shire. This step recognises the distinct (re)development patterns compared to standard or lower density residential zones. This stage uses a K-Nearest Neighbour (KNN) model which incorporates the Land Zoning and Height of Buildings from the LEP, along with the property land area as the key parameters for training and prediction.

- High-Density areas: Training data includes parcels with dwelling counts starting at 9, being the median value of validated candidates, to ensure that the results of the model are more biased to higher yielding properties that are the intended outcome of the zone.
- Medium-Density areas: Training data includes parcels with dwelling counts of 2 or more to better reflect typical development patterns in these zones.

Dwelling counts used in the training data include existing dwellings and dwellings approved under a DA that are yet to be developed. Including DA approvals ensures more recent development yields are being incorporated. The KNN model operates on the principle that "similar inputs produce similar outputs." By identifying records with closely related parameters, it assumes these "neighbours" represent realistic development scenarios for the target property. The KNN results replace first stage yields if applicable.

Third Stage:

Recently approved (last 5 years) Development Applications (DAs) for subdivision or multi-dwelling development are used to update the model. Yields from earlier stages are overridden by DAs, categorized as approved and yet-to-be-developed. This produces the Final Yield, applied to the relevant record.

Fourth Stage:

The fourth stage allows Council to complete a review of the initial model outputs. This step aims to capture site specific information not identified in mapping or ordinance that may reduce or increase potential yields of some sites. Examples include biodiversity issues identified through an historic DA, localised and unmapped flooding, zombie DAs, etc.

Appendix J – Supply and Demand

Uralla LGA (Base)

	Year →	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Demand	14	14	14	14	14	14	13	13	13	12	12	12	12	12	11	11	11	11	11	11	11	11	11
Retail	60	46	32	18	4	-10	-23	-36	-49	-61	-73	-85	-97	-109	-120	-131	-142	-153	-164	-175	-186	-197	-208
Retail and approved	129	115	101	87	73	59	46	33	20	8	-4	-16	-28	-40	-51	-62	-73	-84	-95	-106	-117	-128	-139
Vacant and approved	308	294	280	266	252	238	225	212	199	187	175	163	151	139	128	117	106	95	84	73	62	51	40
All	1,100	1,086	1072	1058	1044	1030	1017	1004	991	979	967	955	943	931	920	909	898	887	876	865	854	843	832

Uralla LGA (Growth)

	Year →	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Demand	14	14	14	19	25	24	16	13	14	13	12	12	12	14	14	14	12	11	12	12	11	12	12
Retail	60	46	32	13	-12	-36	-52	-65	-79	-92	-104	-116	-128	-142	-156	-170	-182	-193	-205	-217	-228	-240	-252
Retail and approved	129	115	101	82	57	33	17	4	-10	-23	-35	-47	-59	-73	-87	-101	-113	-124	-136	-148	-159	-171	-183
Vacant and approved	308	294	280	261	236	212	196	183	169	156	144	132	120	106	92	78	66	55	43	31	20	8	-4
All	1,100	1,086	1,072	1,053	1,028	1,004	988	975	961	948	936	924	912	898	884	870	858	847	835	823	812	800	788

Uralla Township (Base)

	Year →	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Demand	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
Retail	32	26	20	14	8	2	-4	-10	-16	-22	-28	-34	-40	-46	-52	-58	-64	-70	-76	-82	-88	-94	-100
Retail and approved	73	67	61	55	49	43	37	31	25	19	13	7	1	-5	-11	-17	-23	-29	-35	-41	-47	-53	-59
Vacant and approved	208	202	196	190	184	178	172	166	160	154	148	142	136	130	124	118	112	106	100	94	88	82	76
All	665	659	653	647	641	635	629	623	617	611	605	599	593	587	581	575	569	563	557	551	545	539	533

Uralla Township (Growth)

	Year →	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Demand	6	6	6	9	14	13	8	6	7	7	6	6	6	7	8	8	7	6	7	7	6	7	7
Retail	32	26	20	11	-3	-16	-24	-30	-37	-44	-50	-56	-62	-69	-77	-85	-92	-98	-105	-112	-118	-125	-132
Retail and approved	73	67	61	52	38	25	17	11	4	-3	-9	-15	-21	-28	-36	-44	-51	-57	-64	-71	-77	-84	-91
Vacant and approved	208	202	196	187	173	160	152	146	139	132	126	120	114	107	99	91	84	78	71	64	58	51	44
All	665	659	653	644	630	617	609	603	596	589	583	577	571	564	556	548	541	535	528	521	515	508	501

Invergowrie-Saumarez Ponds (Base)

	Year →	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Demand	5	5	5	5	5	5	4	4	4	4	4	4	4	4	3	3	3	3	3	3	3	3	3
Retail	9	4	-1	-6	-11	-16	-20	-24	-28	-32	-36	-40	-44	-48	-51	-54	-57	-60	-63	-66	-69	-72	-75
Retail and approved	36	31	26	21	16	11	7	3	-1	-5	-9	-13	-17	-21	-24	-27	-30	-33	-36	-39	-42	-45	-48
Vacant and approved	47	42	37	32	27	22	18	14	10	6	2	-2	-6	-10	-13	-16	-19	-22	-25	-28	-31	-34	-37
All	351	346	341	336	331	326	322	318	314	310	306	302	298	294	291	288	285	282	279	276	273	270	267

Invergowrie-Saumarez Ponds (Growth)

	Year →	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Demand	5	5	5	6	7	7	5	4	4	4	4	4	4	5	4	4	3	3	3	3	3	3	3
Retail	9	4	-1	-7	-14	-21	-26	-30	-34	-38	-42	-46	-50	-55	-59	-63	-66	-69	-72	-75	-78	-81	-84
Retail and approved	36	31	26	20	13	6	1	-3	-7	-11	-15	-19	-23	-28	-32	-36	-39	-42	-45	-48	-51	-54	-57
Vacant and approved	47	42	37	31	24	17	12	8	4	0	-4	-8	-12	-17	-21	-25	-28	-31	-34	-37	-40	-43	-46
All	351	346	341	335	328	321	316	312	308	304	300	296	292	287	283	279	276	273	270	267	264	261	258

Uralla Balance (Base)

	Year →	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Demand	3	3	3	3	3	3	3	3	3	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Retail	19	16	13	10	7	4	1	-2	-5	-7	-9	-11	-13	-15	-17	-19	-21	-23	-25	-27	-29	-31	-33
Retail and approved	20	17	14	11	8	5	2	-1	-4	-6	-8	-10	-12	-14	-16	-18	-20	-22	-24	-26	-28	-30	-32
Vacant and approved	53	50	47	44	41	38	35	32	29	27	25	23	21	19	17	15	13	11	9	7	5	3	1
All	84	81	78	75	72	69	66	63	60	58	56	54	52	50	48	46	44	42	40	38	36	34	32

Uralla Balance (Growth)

	Year →	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043	2044	2045	2046
Demand	3	3	3	4	4	4	3	3	3	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Retail	19	16	13	9	5	1	-2	-5	-8	-10	-12	-14	-16	-18	-20	-22	-24	-26	-28	-30	-32	-34	-36
Retail and approved	20	17	14	10	6	2	-1	-4	-7	-9	-11	-13	-15	-17	-19	-21	-23	-25	-27	-29	-31	-33	-35
Vacant and approved	53	50	47	43	39	35	32	29	26	24	22	20	18	16	14	12	10	8	6	4	2	0	-2
All	84	81	78	74	70	66	63	60	57	55	53	51	49	47	45	43	41	39	37	35	33	31	29