



Productivity Commission - Inquiry into Transitioning Regional Economies

INTRODUCTION

Regional Capitals Australia (RCA) is pleased to present this submission for consideration by the Productivity Commission and welcomes the potential for the study's outcome to inform the government's approach to regional policy.

RCA is an alliance of 29 local government associations across the nation, representing Australia's regional cities. Regional capital cities (RCCs) are home to almost four million people and service the needs of another four million Australians who live in surrounding areas. Jointly RCCs generate \$225 billion per annum, or more than 15 per cent of national economic activity.

Regional Capital Cities

Australia's RCCs are cities that perform a functional role; they are not defined statistically but by the role they play in the wider region. This is the 'hub and spoke' model of regional development. RCCs provide a central point to access essential infrastructure, services, business, employment and education. These services and infrastructure are accessed by local residents as well as those in surrounding towns and rural areas. Every day, eight million Australians rely on RCCs for their everyday needs.

RCA considers the Productivity Commission's study into transitioning regions as "timely" in that a lack of analysis of our cities are preventing a significant policy focus that will assist in turning the tide of the economic decline.

All cities that work are economic assets – that is why it is the position of RCA that the productivity of regional Australia can only grow if the role of urban centres in regional Australia are adequately planned for, funded and their performance is measured. Further, RCA submits that the importance of RCCs to their wider region be specifically recognised as part of the national regional policy going forward.

OPERATING IN A NATIONAL CONTEXT

Transitioning economies and productivity declines are not the domain of regional Australia alone.

Job losses in traditional labour markets are occurring nationally, including large numbers in the suburbs of Melbourne and Sydney. The Committee for Economic Development of Australia (CEDA) has predicted 40% of all Australian jobs that exist today could be lost to automation by 2030, according to the Australia's Future Workforce report.

It is well documented, however, that as this transition is occurring, metropolitan cities are also gaining the benefit of the growth in knowledge-driven services sectors found predominantly in capital city CBDs.

According to analysis undertaken by consultancy SGS Economics and Planning, this impact will continue to refine with just three dynamic service industries – finance, professional services, information media and telecommunications – making up 40 per cent of Sydney's economy in under 10 years. This growth in knowledge driven services is being replicated across other capital cities across the nation.

The decline in the traditional labour markets and growth in services has occurred concurrently to the unprecedented growth in national population. Both issues are impacting capital city efficiency as the pressure to connect more people and products to jobs and markets (predominately located or through CBDs) is stretching economic infrastructure – in some cases bringing cities to a grinding halt.

In 2011, the cost of delays on roads in the five largest capital cities was \$13.7 billion – this is projected to grow by around 290 per cent to \$53.3 billion in 2031.

Infrastructure Australia (IA) today, puts the cost of addressing this congestion through national infrastructure delivery at anywhere between \$450 - \$700 billion. The 2017 priority list of projects alone is valued at \$60 billion. Federal and State governments cannot afford to allow this gap to widen.

All cities that work are enormous economic assets and play a vital role in building a strong economy. Regional Australia Institute (RAI) estimates that for every 100,000 Australians who choose to live in RCCs rather than the big five metropolitan cities, will release \$50 billion in reduced congestion cost savings in the next 30 years.

The opportunity to ease the squeeze on Australia's metropolitan capitals whilst also building the economic capability of Australia's RCCs, including those in (or likely to go into) transition, must now be embraced. This is particularly true when the wider regional benefit of creating true service and economic regional hubs is captured.

The Regional Australia Institute (RAI) estimates that for every 100,000 Australians who choose to live in RCCs rather than the big five metros, an additional \$50 billion will be released into the economy over 30 years in reduced congestion costs alone.

RCA asserts that a lack of analysis of and planning for Australia's RCCs will continue to widen the economic gap for regional Australian's and create an over-reliance on capital cities that comes with an unmanageable infrastructure deficit. To ensure that there is balanced growth and productivity gains across the nation, it is clear Australian Governments and businesses need a new solution that moves past the capital city bias that is now engrained in our national leadership.

Liveability and Connectivity

RCCs have different productivity challenges to Australia's largest cities and these are compounding the current challenges to traditional labour supplies. The same CEDA report found that an even higher likelihood of job losses due to automation will occur in parts of rural and regional Australia, with more than 60% of jobs existing today not existing in just under 15 years.

Left unabated this transition will multiply current economic challenges such as higher than average unemployment (2%), lower than average (6%) worker productivity. RCCs also have lower year 12 completion rates (42%) compared to the national average (52%). These figures continue to increase the further a resident moves away from an urban centre, as a workers' ability to access higher education and skills development that lead to higher value jobs decreases.

Our members know that to drive jobs and economic growth within a RCC, a city requires two key advantages – liveability and connectivity. Ensuring RCCs are liveable and connected means that business across Australia is provided with an economically-sound, investable alternative, and skilled and knowledgeable workers are provided with a socially-sound, liveable alternative.

Planning and investment in a RCC must be focused on enabling that city to be:

1. **Connected** – with high speed broadband, telecommunications, roads, rail, ports and airports; and
2. **Liveable** – regional access to tertiary education, health, sporting facilities, arts and cultural centres and well-planned and activated CBDs.

In short, to remain competitive at a local and global level, RCCs need to not only to capitalise on their core strengths but to ensure their cities can continue to attract new businesses for adequate diversification of industry and a growing knowledge worker and skilled labour force to supply the growing industry and guard against industry-specific downturns and economy-wide shocks.

PLANNING AND POLICY DEVELOPMENT

National policy has historically taken a view of managing productivity through the lens of an urban agenda for the five major metropolitan capitals and a primary production agenda of regional Australia. Until very recently, with the Government's announcement of a Regional City Stream for City Deals Australia's RCCs have not had a place in national policy.

The lack of policy focus on the urban agenda for regional Australia has done little to advance the growth and functionality of RCCs and the over-reliance on traditional labour models in regional economies. A holistic, co-ordinated approach is crucial to ensuring the sustainability of our regions and in particular, mitigating against any economic shocks.

RCA also submits only national leadership will deliver the shared oversight required to meet the growth needs of both regional cities and Australia's regions.

RCA has identified three areas of government policy:

1. A new national regional development strategy that maps the service hub role of RCC,
2. Continuation of the roll out of the regional city stream of the Smart Cities – City Deals
3. A commitment to planning for and delivering on regional priorities outlined in Infrastructure Australia's – Australian Infrastructure Plan.

It is anticipated that as the population of our member cities continues grows so will the economic opportunities for the communities that reside. This is largely due to the ability to economically diversify, making public and private investment more attractive.

Regional Development Strategy

RCA welcomed the January 2016 Australian Government announcement to create a new Australian Government Regional Development policy.

It is the position of RCA that the development of this policy begin immediately and the policy should seek to:

- Map how infrastructure and services in regional capital cities are used by residents and communities in the surrounding rural areas (also known as the hub and spoke model)
- Use this to inform investment priorities in regional capital cities that benefit the whole region;
- Develop initiatives that will encourage population growth in regional capital cities; and
- Develop a more equitable model of evaluating national infrastructure investment, focusing on how regions can better contribute to GDP objectives.

RCA Recommendation 1: The Commission make recommendations to the Federal Government in relation to the timely development of the 2017 Regional Development Policy in line with the four areas identified by RCA.

Smart Cities and Regional City Deals

RCA welcomed the Government's announcements in 2016 in relation to the regional cities stream of the Smart Cities - City Deals process. This is the first time that a government has begun to plan for the unique urban challenges that sit outside the major metropolitan cities. It is RCA's position that the development of a network of socially and economically thriving RCCs is critical to the nation's growth, and many of our members have cited the receipt of a City Deal as a game-changer for their community and economy.

The less publicised output of this program is the wider regional impact of a City Deal – RCC and regional are socially and economically interlinked. RCA highlights that the Productivity Commission should encourage the Government to ensure that City Deals negotiate around wider regional economic issues to capture the growing and import service hub role that RCCs play. This issue is captured in the case study outlined below.

Snapshot Case Study – Ballarat: the Capital of Western Victoria

The City of Ballarat, which is one of Australia's largest inland cities and the third largest city in Victoria, is host to some of the nation's most historic mining and political heritage. Home to more than 100,000 people, Ballarat's city boundaries cover 740 kmsq and the city is just over 115km from the State's capital Melbourne.

Located in Western Victorian, the city provides services and infrastructure for the wider regional area of 400,000 people.

Ballarat is in a key strategic position at the centre of some of Victoria's most important freight, tourist and commuter transport routes. The four main highways radiating from Ballarat - the Western, the Midland, the Glenelg and the Sunraysia - connect it to industrial centres such as Melbourne, Adelaide, Geelong and Portland; regional locations like Bendigo and Mildura; and agricultural areas in the Mallee and Wimmera.

Due to the city's connectivity and proximity to Melbourne, the city has a high number of professional commuters and it is expected that the city will grow by more than 35% in the next 20 years.

Like many RCCs there is high employment in healthcare and social assistance, retail trade, manufacturing and construction. Unlike many RCCs there is a growing professional, scientific and technical services sector. Ballarat requires 15,000 new jobs in the next 15 years to support the projected population increase of 35,000 new residents.

With the wave of growth now being experienced, Ballarat has undertaken a significant city planning - the "Ballarat Regional Capital Plan" to ensure the city reaches its potential as the capital of Western Victoria. Projects include:

- Economic transformation: the development of a new employment zone and tech park
- CBD revitalisation: including transport connectivity and parking, civic hall and a renewed retail offering
- Regional health and education: an education and health precinct with an innovation hub
- World-class events and culture: facilities to attract and house world-class cultural and sporting events, as befits a capital city.

The City of Ballarat has cited CDs as a 'game-changer', highlighting the new way of doing business as a unique opportunity and catalyst for immediate benefit and value without the holding costs normally associated with speculative development. Immediate benefits would subsequently spur confidence in the regional community and private sector.

RCA recommends that the Australian Government recognise the significant investment that will be required across the government portfolios of education, innovation, infrastructure, communications and environment and prioritise an investment stream towards regional city deals within the departmental budgets.

RCA Recommendation 2: The Commission recommend the Federal Government highlight the growing social and economic interconnectivity between regions and RCC in the delivery of the regional city stream of city deals.

Infrastructure

Investing in infrastructure contributes directly to regional economies, providing jobs, increasing value-add spending and lifting productivity both within the RCC and the surrounding region. Effective infrastructure investment, however, requires strategic planning based on probative evidence to inform those priorities.

Australian Infrastructure Plan

To support the delivery and success of both the impending regional development plan and the regional city deals stream, RCA highlights that a program of planning for and investment in regional infrastructure must be key. **Strategic** infrastructure investment is the keystone of all productive and liveable cities. Outside of roads funding, the infrastructure needs of regions have not been well understood, nor planned for by successive State and Federal Governments. RCA supports evidence creation, investment and collaboration around the key priorities that Infrastructure Australia (IA) identified in the *Australian Infrastructure Plan (AIP)* for regional Australia. The most notable recommendations are:

Australian Infrastructure Plan (AIP) Recommendation 4.2:

- *The Australian Government should prioritise investment in regional infrastructure where the population is growing quickly and where the bulk of our regional economic growth can be found.*
- *Efficient, livable and productive regional hubs should be considered national economic assets and be a key priority for investment.*

Australian Infrastructure Plan (AIP) Recommendation 4.3:

Regional infrastructure investment should respond to each community's particular needs, its changing demographics, and what is affordable. Where governments are providing infrastructure in slower growing regions, they should make available information on how infrastructure is being used to address efficiency and equity issues, what taxpayers can expect in return and how such investments will be maintained over time.

Australian Infrastructure Plan (AIP) Recommendation 4.5

The development of the proposed National Freight and Supply Chain Strategy should be informed by CSIRO's Transport Network Strategic Investment Tool (TRANSIT). This tool should be used to identify the most efficient routes along major supply chains and to inform funding decisions on where strategic regional projects will have the most substantial economic impact.

RCA acknowledges that the AIP and the Federal Government, through their response to the AIP, have highlighted that State governments are responsible for regional infrastructure planning, **RCA states that only national leadership will deliver the shared oversight required to meet the growth needs of both regional cities and Australia's regions.**

As such, RCA recommends that strong consideration be given to an infrastructure investment stream that will incentivise State and Territory Governments to develop and fund long-term regional infrastructure plans to deliver on the following recommendation:

Australian Infrastructure Plan (AIP) Recommendation 4.1:

State and territory governments should deliver long-term regional infrastructure plans. These plans should:

- *Identify gaps in infrastructure networks and identify priorities to support productive regional industries;*
- *Be developed with involvement from all levels of government to help coordinate investments and remove duplication;*
- *Provide transparency for the private sector to allow for government funding to be leveraged and private investment to be maximised; and*
- *Assess the potential for regions to ease pressure on our largest cities.*

RCA Recommendation 3: That the Commission seeks the following actions from the Federal Government in relation to infrastructure funding:

- *Ensure the Australian Government delivers on Infrastructure Australia's AIP, specifically recommendations 4.2, 4.3 and 4.5*
- *Take a leadership role to work with and incentivise State and Territory Governments to deliver on Infrastructure Australia's AIP, specifically recommendations 4.1*

ADDRESSING EVIDENCE GAPS

Terms of Reference (4): "Devise an analytical framework for assessing the scope for economic and social development in regions which share similar economic characteristics, including dependency on interrelationships between regions".

It is the position of RCA that Australia's regions will thrive when a RCC's **long-term strategic value AND its social and economic links to the region it serves are understood and planned for**. The growing reliance on cities as a source of infrastructure, economic agglomeration and services means the dependency of a region on its RCC (as opposed to dependency on interrelationships between regions) is key. It is vital that any analytical framework examining economic and social development of Australia's regions address this factor.

Examining the wider regional impact for comparison between regions; in this case, for economies in or likely to go into a period of transition, presents a challenge. This is largely due to the unavailability of required data sets.

When preparing the RCA submission to the 44th Parliament's Senate Inquiry into "(t)he future role and contribution of regional capitals to Australia", RCA found large data gaps associated with understanding the level and drivers of growth and investment in RCCs alone. There was almost no data available to understand the comparative impact on a city through regional funding or the impact on a regional area where investments into a city had occurred.

This gap was confirmed by the Regional Australia Institute in the Canberra Senate Hearing when it was recognised that data gaps are one of the biggest challenges to the institute's work. CEO Jack Archer stated it was "*factually impossible to make a decent assessment*" on the level and effectiveness of investment into RCCs".

The detailed analysis undertaken by the Standing Committee on Rural and Regional Affairs and Transport affairs inquiry into RCCs highlighted a deep concern for this issue, and reflected a clear recommendation in the final report to close these gaps.

"(t)he future role and contribution of regional capitals to Australia" Final Report Recommendations:

Senate Inquiry Recommendation 3	<i>The committee recommends that the Australian government develop a national data set focused on regional capitals. Specifically, data should be gathered on: (a) who is using the resources in each regional capital (including non-residents); (b) how much Commonwealth and state funding is provided to each regional capital; and (c) the projected growth of each regional capital.</i>
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Gaps – liveability and connectivity indicators in RCCs

Where a RCC and the wider region may have a competitive advantage or a strategic gap on ‘liveability’ indicators such as: air pollution, housing affordability, traffic congestion and average commuting time, these indicators are not widely measured in RCCs, meaning the liveability of a RCC and the wider region is not easily measured, compared and, as a result, planned for.

Where a RCC may have a competitive advantage or a strategic gap on ‘connectivity’ indicators there is little analysis or metrics available to demonstrate and compare a city’s connectivity to its region, state capital or even other RCCs. This means the connectivity of a RCC and the wider region is not easily measured, compared and, as a result, planned for.

Both of these gaps are important indicators to understand if the objective is to create jobs and increase private sector investment, and to deal with a changing economy. It is clear that businesses will analyse these indicators when making investment decisions and workers will assess these issues when making liveability choices.

Likewise, it is vital that government agencies making funding and other decisions impacting on regional Australia examine liveability and connectivity as key indicators in assessing a *‘the degree of economic dislocation / engagement, transitional friction and local economic sustainability for regions across Australia and rank those regions to identify those most at risk of failing to adjust’ (Terms of Reference No.3).*

Gaps – RCCs as service hubs

It has long been the view of RCA that regional development policy and associated funding has not recognised the role of RCCs as providing services and infrastructure hubs and gateways to international markets. Any move to examine RCCs based on their strategic importance to their surrounding region would significantly benefit any economic analysis.

The social and economic relationship between RCCs and regions has received almost no national policy attention – meaning once again, data available to demonstrate and compare a city’s role as a service hub largely does not exist. The exception to this issue is in the area of health where the hub and spoke policy is well understood and implemented across regional Australia.

These issues must be addressed to plan for and map the success of regional, rural and remote Australia. A lack of comparative data is a clear roadblock to the impending regional development strategy.

RCA Recommendation 4: That when developing an analytical framework for assessing the scope for economic and social development in regions which share similar economic characteristics (Terms of Reference No.4), the Commission seek the commitment of the Federal Government to create an analysis of the unique growth and investment drivers of regional cities, namely:

- *Mapping the liveability and connectivity of the cities; and*
- *Mapping the relationship between a regional capital and the region it serves.*

JOBS, SKILLS AND DIGITAL READINESS

From a RCCs perspective, jobs and growth is inextricably linked to a region's ability to better connect to global markets while attracting fast-growing, vibrant technology industries. Regions must be able to train and attract a workforce that innovates and diversifies their economies.

Technological connectivity is key to achieving this aim.

Regional Tertiary and Education Availability

There is a significant differential in higher education attainment between city and regional Australians. The Regional Universities Network cites that in 2011, 31% of people aged 25-64 who lived in major cities held a Bachelor degree or above. This figure declined to 18% for Australians living in inner regional areas, to 15% for outer regional areas and down to 12% for very remote areas.

Thriving regional universities are essential to help ameliorate this discrepancy. Regional universities not only offer this opportunity more readily to our regionally-based young people, they also help to train, attract and retain the skilled workers required for a successful and diversified economy. Historically, students who study in regional areas are likely to remain in the regions, thus contributing socially and economically to their communities. Evidence shows, for example, that 60-80% of graduates within the Regional Universities Network are employed in regional Australia a few months after graduation, with around two thirds remaining employed in regional areas five years after graduating.

A thriving regional university sector is critical to ensuring that RCC can continue to provide many of the same services provided by metropolitan capitals, whilst continuing to grow our already substantial contribution to Australia's economic activity.

Regional universities also have enormous potential in driving regional innovation, and regional economic, social and cultural development. The Regional Universities Network has stipulated regional universities perform a growing share of Australia's highly ranked research, much of which is undertaken in close partnership with regional Australian industries and communities.

Increasing the accessibility of regional tertiary education and skills development should be a key Government priority in preparing regional economies for transition.

RCA Recommendation 5: The Commission makes a recommendation to the Federal Government to drive jobs and growth in regional areas in order to diversify economies entering a period of transition, by:

- *Setting aside funds for regional universities and TAFEs, giving better support to regional research and education facilities.*

Promote digital readiness to transition the economy

Automation and the changing face of work necessitates that Australia must be 'digital ready'. The digital economy has enormous potential to deliver jobs and growth and diversify the nation's economy but much needs to be done to ensure this can occur.

National Broadband Network

The availability of high-speed broadband services and other connectivity technologies has given Australians choices and has reduced, to a degree, the tyranny of distance in regional areas. These technologies also mean that economies reliant on outputs such as primary production, manufacturing, health and professional services must advance if they are to remain relevant and competitive and connect to new markets.

Connectivity enables a new generation of knowledge workers to become mobile – they do not have to work where they live or live where they work. They do, however, bring innovation and diversification to their destination economies, vital factors for growth and productivity. Better internet connections draw jobs to regions not just by attracting businesses, but by attracting workers for whom fast broadband is a baseline requirement to move to an area.

RCC are ideally suited to be what KPMG calls ‘magnet cities’ – cities that attract educated, ambitious and energetic young people, or ‘young wealth creators’. Telecommunications access is an essential element of a successful magnet city. Uneven access to high-speed broadband and mobile black spots constrain innovation and discourage such people to live and work in RCC. In RCA’s 2016 membership survey, 80% of the capitals surveyed cited communications and technology as a ‘top 3’ policy priority for their city.

The NBN rollout – a crucial component of regional connectivity – requires attention. When the NBN was announced, it was welcomed as a means of narrowing the economic and social inequity between residents in regional cities and those in metropolitan areas. However, much has happened in the last financial year, including a \$20 billion federal loan in November to pay for the final phase of construction of the network, and the proposed *regional broadband scheme*, in December 2016. RCA is concerned that these factors could delay rollout plans, and essentially result in these outlying areas waiting much longer for an improved service comparable to the metropolitan areas.

In short, RCA submits that the Government needs to prioritise the accelerated rollout of NBN in regional areas.

The detailed analysis undertaken by the Standing Committee on Rural and Regional Affairs and Transport inquiry into RCCs also confirmed this issue and led the committee to make a clear recommendation in the final report to close these gaps. The recommendation is as follows:

“(t)he future role and contribution of regional capitals to Australia” Final Report Recommendations:

Senate Inquiry Recommendation 4	<i>The Australian government ‘accelerate the roll-out of the National Broadband Network to all regional capitals across Australia’.</i>
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Mobile Blackspots Program

The 2015 Infrastructure Australia Audit has projected: “*demand for telecommunications infrastructure will continue growing faster than GDP growth*”. This is largely due to business and consumer demand for services that increasingly depend on high volumes of data. This includes agriculture, tourism, financial services – industries that drive regional economies. RCCs require the speed and scalability of infrastructure to connect cities and take advantage of the growing opportunities of an increasing technology-focused economy.

RCA welcomed the December 2016 announcement by the Government of Round 2 of the Mobile Black Spot Program, planned to deliver 266 new and upgraded mobile base stations in regional Australia. RCA submits that in recognition of their strategic economic importance, regional capital cities should be clearly prioritised in Round 3 locations, due to be announced in 2017.

Additionally, RCA has recommended to the Federal Government that it allocate resources and investment to the Department of Communication and the Arts to deliver on recommendation 4.4 of the *Australian Infrastructure Plan*:

Australian Infrastructure Plan Recommendation 4.4

The Australian Government should remove barriers to entry for mobile network providers in regional Australia to facilitate improvements in coverage, competition and service quality. This should include:

- Considering the merits of modifying the existing fixed-line Universal Service Obligation in regional areas toward improving mobile coverage;

- Where possible and appropriate, making National Broadband Network backhaul and towers available to mobile network providers; and
- Taking steps to encourage mobile network providers to co-locate their mobile infrastructure.

RCA Recommendation 6: The Commission makes recommendations to the Federal Government to promote digital readiness in regional Australia by:

- *Prioritising full fibre to the premises for regional capital cities by 2025;*
- *Prioritising regional capital cities in Round 3 of the mobile blackspots program; and*
- *Allocate resources and investment to the Department of Communications and the Arts to deliver on recommendation 4.4 of the Australian Infrastructure Plan*

SUMMARY OF RECOMMENDATIONS

RCA makes six recommendations for the Commission to consider in undertaking its study into transitioning regional economies.

1	The Commission recommends the Federal Government in relation to the timely development of the 2017 Regional Development Policy in line with the four areas identified by RCA.
2	The Commission recommend the Federal Government highlight the growing social and economic interconnectivity between regions and RCC in the delivery of the regional city stream of city deals.
3	That the Commission seek the following actions from the Federal Government in relation to infrastructure funding: <ul style="list-style-type: none"> • Ensure the Australian Government delivers on Infrastructure Australia's AIP, specifically recommendations 4.2, 4.3 and 4.5 • Take a leadership role to work with and incentivise State and Territory Governments to deliver on Infrastructure Australia's AIP, specifically recommendation 4.1
4	That when developing an analytical framework for assessing the scope for economic and social development in regions which share similar economic characteristics (<i>Terms of Reference No.4</i>), the Commission recommends the Federal Government to create an analysis of the unique growth and investment drivers of regional cities, namely: <ul style="list-style-type: none"> • Mapping the liveability and connectivity of the cities; and • Mapping the relationship between a regional capital and the region it serves
5	The Commission recommends the Federal Government to drive jobs and growth in regional areas in order to diversify economies entering a period of transition, by: <ul style="list-style-type: none"> • Setting aside funds for regional universities and TAFEs, giving better support to regional research and education facilities
6	The Commission recommends the Federal Government to promote digital readiness in regional Australia by: <ul style="list-style-type: none"> • Prioritising full fibre to the premises for regional capital cities by 2025; • Prioritising regional capital cities in Round 3 of the mobile blackspots program; and • Allocate resources and investment to the Department of Communications and the Arts to deliver on recommendation 4.4 of the Australian Infrastructure Plan

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