

DIRECTIONS

THE GEELONG REGION DEVELOPMENT STRATEGY



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Geelong Regional Commission



Directions

The Geelong Region Development Strategy

REPRINTED JUNE 1990

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THE IMPLEMENTATION SCHEDULES FORMERLY
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GEELONG REGIONAL COMMISSION

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Minister's Foreword

Over the past four years the staff of the Geelong Regional Commission have worked assiduously to develop the Geelong Region Development Strategy. The task had its genesis in the State Government's 1984 Economic Strategy, which acknowledged the importance of a development strategy for the Geelong Region.

An important aspect of the State Economic Strategy is the emphasis on actions that build on Victoria's competitive strengths. The Geelong Region is particularly important in this regard with its highly concentrated and diverse manufacturing industry contributing significantly to the State's industrial skill base.

The central location of the Port Phillip Region as a transport, distribution and communications hub for south-eastern Australia is an important feature of the Victorian economy and Geelong plays an extremely important role in this Region. Integration into national transport routes and well developed infrastructure give the region a solid base on which to build.

Victoria also has a competitive strength in tourism destinations, which are no better exemplified than by the magnificent coastal resorts of the Bellarine Peninsula and the Surf Coast of the Geelong Region.

The purpose of the State Economic Strategy is the maximization of income and employment growth. Government policy gives very high priority to encouraging a productive culture that emphasises international competitiveness and supports firms and industries with growth and export potential. The adoption and diffusion of new technology, attention to design and product quality, better management practices, and the raising of education and skill levels, are all areas of concern to the Government. The Geelong Region Development Strategy reflects these concerns without losing sight of community issues and the protection of the environment.

The Strategy has been well researched and subjected to an intensive consultation process in the Region. The result is a highly readable and visionary document which firmly indicates the thinking and aspirations of a wide range of people and organisations in the Geelong regional community.

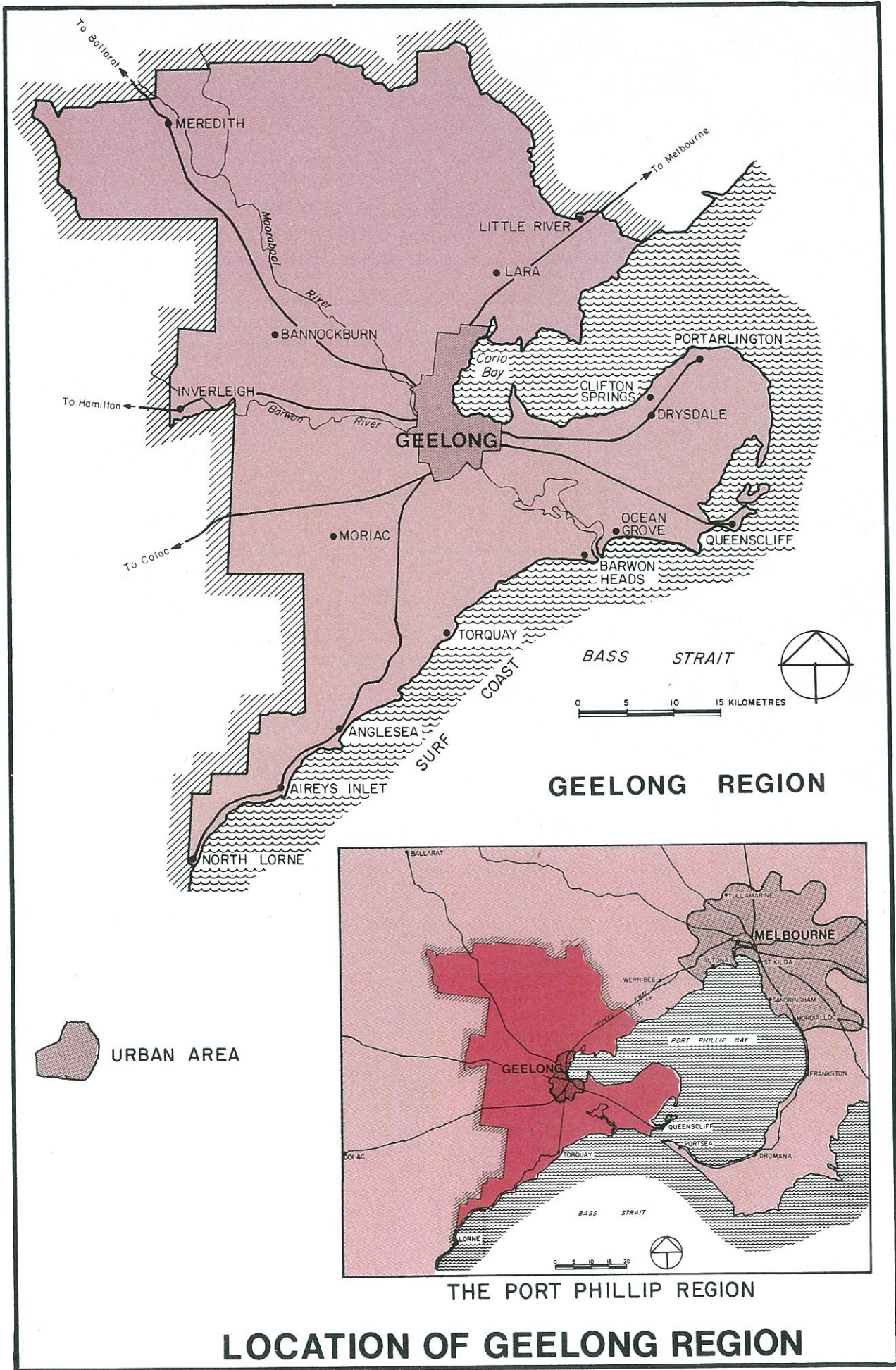
The co-operation of other Government agencies in the preparation of this Strategy has been a feature of the work undertaken, with a number of those agencies reviewing long held strategies in the light of community wishes and expectations. As a statement of community priorities, the Strategy prescribes action plans that agencies should consider in future planning.

It will be the Commission's task to pursue the implementation of the Strategy in accordance with Government policies, State-wide priorities, and budgetary limitations.

Finally I would like to congratulate the Commission on a job well done and look forward to the successful implementation of many of the strategy proposals during the coming years.



ROBERT T. FORDHAM, MP
Minister for Industry, Technology and Resources.



Chairman's Foreword

The Geelong Regional Commission by statute is charged with a responsibility to 'encourage, co-ordinate and assist in the development of the Geelong Region'.

It follows then that the Commission is vitally concerned with securing the future development of the Geelong Region in the face of the challenges of the day, and ensuring that its people have a framework or guide upon which to base their everyday decisions and choices.

My assessment of the future of the Geelong Region is very positive. There are a number of reasons for this view but three stand out:

- (i) the basic infrastructure which is capable of supporting substantial development.
- (ii) the Geelong Region has varied competitive strengths and a favourable lifestyle which will continue to attract residents, workers and visitors.
- (iii) the Geelong Region is clearly defined with a continuing commitment to regional strategic planning.

The Geelong Regional Commission has committed itself for the past four years to the co-ordination of a community plan for the strategic development of the Region.

It is important to understand just what is entailed in 'Directions: The Geelong Region Development Strategy'.

Two key words are community and development. It is not the Commission's strategy nor is it a public sector strategy. Its aim is to achieve an expansion of private sector activity by facilitation and public sector investment in critical infrastructure, and to ensure that community services and social capital keep pace with that development.

The Strategy will also provide a clear framework for public sector programs in the Region, including the Commission's own activities. A ten year vision provides the broad outline, whilst a five year implementation plan develops specific programs in detail, with a priority assessment of each individual task. Programs will be monitored and evaluated over the period of the plan so that they remain responsive and achievable.

Finally, I wish to take this opportunity to thank the many government departments, business and community groups and individuals who have contributed to the Geelong Region Development Strategy and look forward to their continuing co-operation in its implementation over the next decade.



COLIN K. ATKINS
Chairman
Geelong Regional Commission

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Acknowledgements

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Geelong Regional Commission Study Team and Strategy Co-ordination

Mr Colin Atkins, Chairman, Geelong Regional
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Mr Charles Andrews, Senior Planner (to May
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Geelong Co-Ordination Group

An inter-departmental working group
comprising senior officers from the Department
of Management and Budget, Department of the
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Technology and Resources and the Ministry for
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- Geelong Chamber of Commerce;
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- Metal Trades Industry Association of
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- Gordon Technical College and Deakin
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- the 86 respondents to the Geelong regional
firms' survey;
- other interested groups, individuals and
representative organisations who have
contributed;
- the 52 respondents to the public consultation
phase.

Geelong Regional Commissioners

Geelong Regional Commissioners involved in the development of the Strategy since April 1983 include:

Present Commissioners

Commr. C.K. Atkins
Commr. G.N. Brown (from Aug. '85)
Commr. M.A. Cameron (from Dec. '86)
Commr. R.S. Haebich (from Aug. '86)
Commr. F.C. Heweston
Commr. H.R. Leach
Commr. M.E. Likkel
Commr. P.J. Loney (from March '85)
Commr. V.F. Robinson (from Aug. '87)
Commr. A.D. Scott (from Aug. '84)
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Commr. H.K. Spurling (from Aug. '87)
Commr. R.J. Stephens (from Aug. '84)
Commr. R.W. Whiteside

Past Commissioners

Commr. M.G. Anderson (to Aug. '86)
Commr. H.A. Buskins (Nov. '83 to Feb. '85)
Commr. A.L. Dean (to July '84)
Commr. A.K. Edgar (to Aug. '83)
Commr. J.E. Fidge (to Oct. '83)
Commr. G.D. Hawkins (to Oct. '83)
Commr. H.J. Glover (March '85 to July '87)
Commr. L.K. Johnson (Aug. '85 to July '87)
Commr. W. Jones (Nov. '83 to July '85)
Commr. W.H. Kenworthy (to July '85)
Commr. J. Lindros (Sept. '83 to Nov. '86)
Commr. J.W. Pettitt (to July '86)
Commr. A.E. Roworth (to Jan. '85)
Commr. J.G. Venters (to July '84)



Back Row (L to R) — Cr. G.G. Smith, J.P.; Cr. H.R. Leach, O.B.E., J.P.; Mr. P.J. Loney, B.A., T.P.T.C.; Cr. R.J. Stephens; Mr. R.W. Whiteside, B.C.E., Dip. C.E., E.W.S., F.I.E. Aust.; Cr. V.(M.) Robinson; Mr. M.E. Likkel; Cr. R.S. Haebich, J.P.
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(Absent — Cr. F.C. Heweston, J.P.; Cr. A.D. Scott.)

Executive Summary

'Directions: The Geelong Region Development Strategy' unites three distinct concepts which were presented to the community in document form at the public consultation phase. These were the Regional Economic Development Strategy, Urban and Township Development Strategy and Human Services Initiatives for the Region. These concepts were seen to be the most effective means by which the physical and human resource aspects of development could be represented for public consideration at the time.

The Geelong Region Development Strategy is supported by a considerable body of research undertaken on behalf of the Geelong community by the Geelong Regional Commission and an extensive consultation program which indicated broad support for the major elements of the Strategy.

The Strategy is an integral part of the Victorian State Government Economic Strategy, first documented in 1984 and updated in 1987.

The conceptual underpinning of the Strategy is a 'filter down' process (Figure 1) from a statement of assumptions and the identification of priority issues to a regional goal, three regional sub-goals and a set of programs which provide the broad framework for action over the next ten years in the Region. The action programs are supported by specific tasks, responsibilities, involvement, timing and funding considerations in a rolling five year Implementation Plan. The Five Year Implementation Plan is geographically summarised in Figure 2.

'Directions' is in effect a ten year vision and a five year plan, with its constituent parts the issues, goals, action programs and tasks identified at each appropriate level in the document.

Figure 3 illustrates the Physical Framework Plan of the Geelong Region Development Strategy.

Figure 1

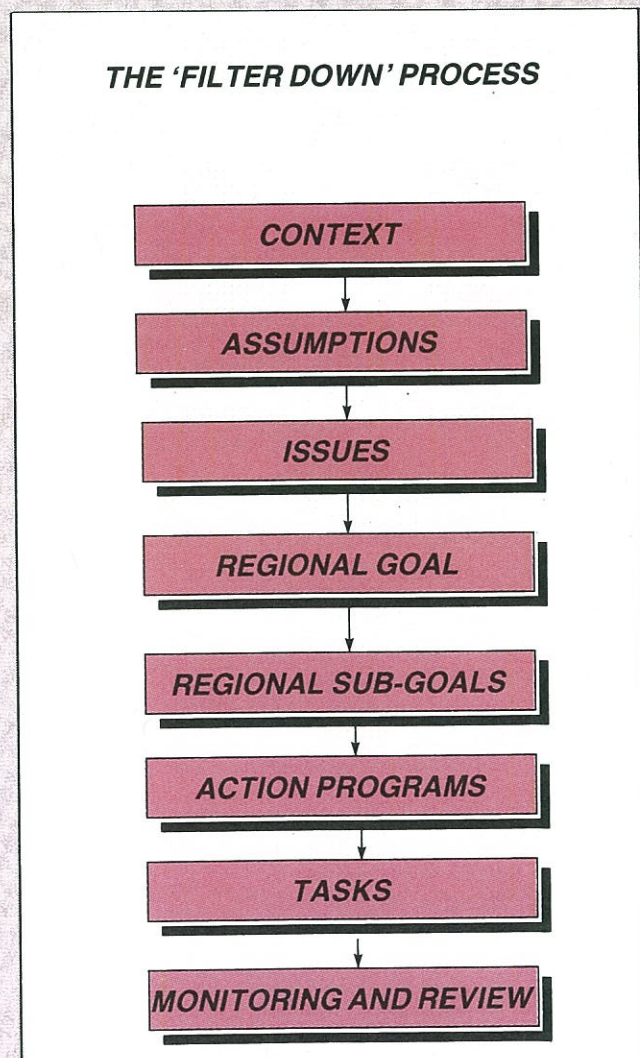


Figure 2 — FIVE YEAR IMPLEMENTATION PLAN: A GEOGRAPHICAL SUMMARY

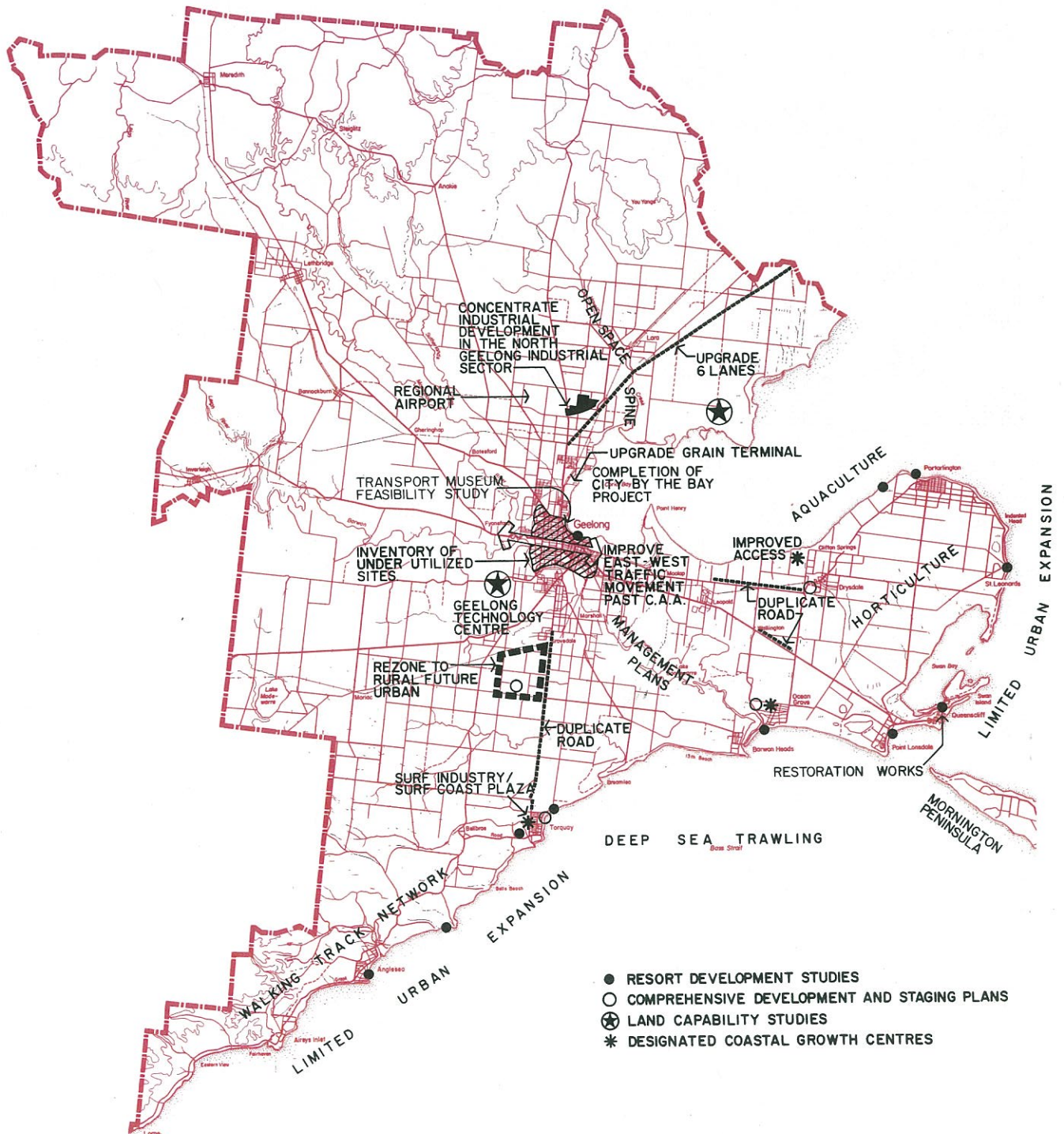
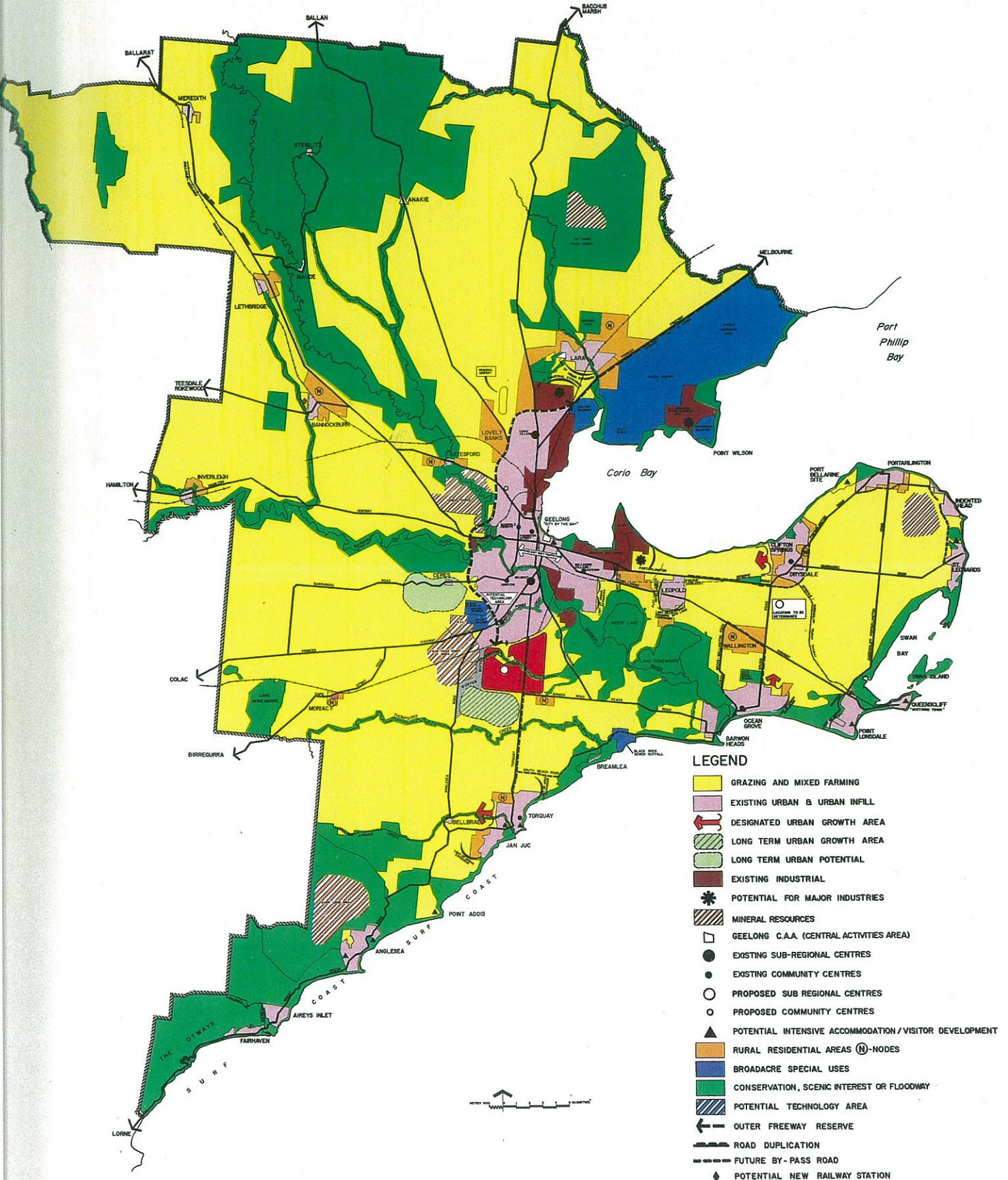


Figure 3 — PHYSICAL FRAMEWORK PLAN



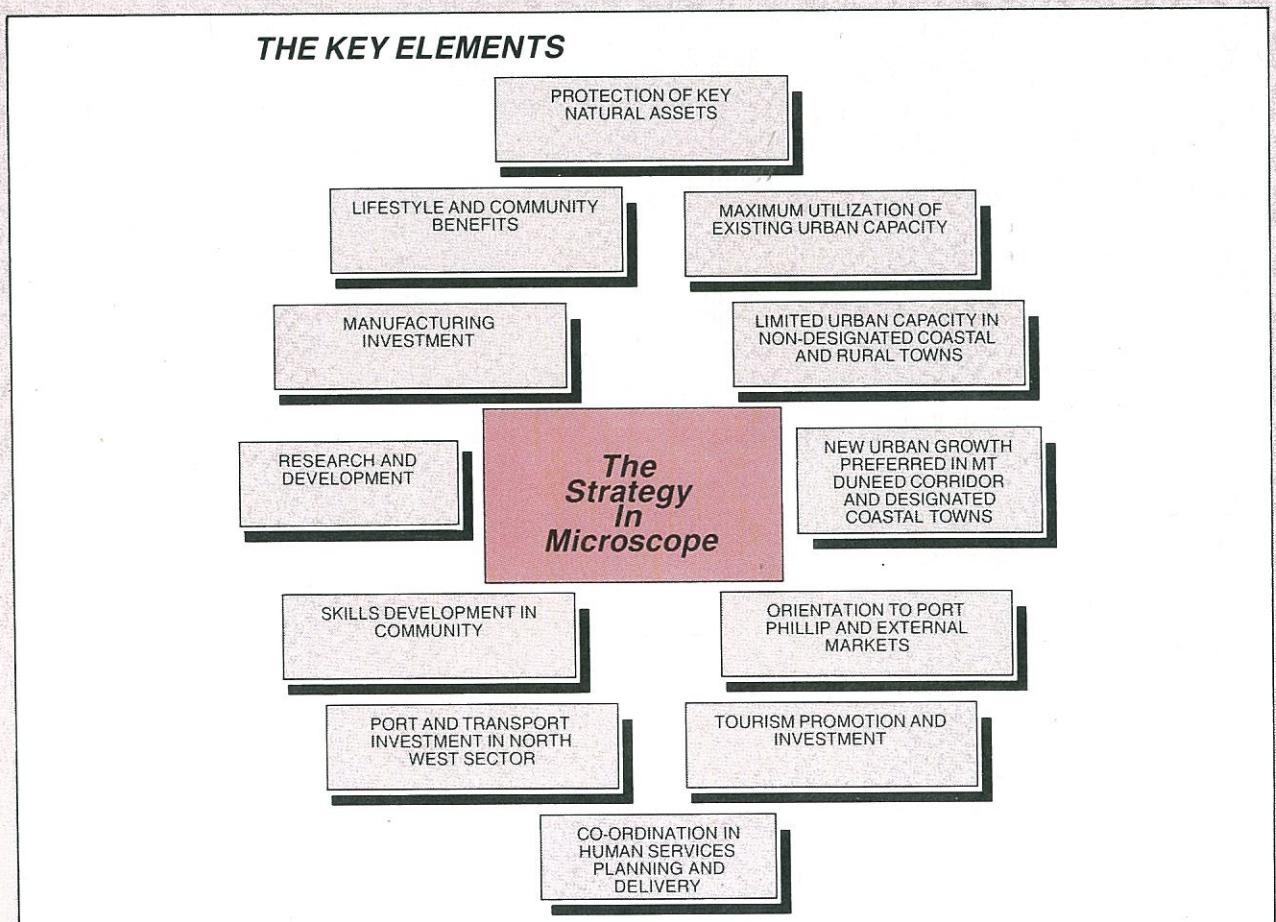
Whilst it is a composite Strategy the broad thrust can be identified as follows:-

- emphasis on optimising competitive strengths, such as manufacturing skills and investment, strategic location, transport infrastructure, natural assets, social infrastructure and lifestyle;
- promotion of opportunities including tourism investment, research and development in association with the skill and post-secondary education base, Port Phillip Bay and Western District linkages and new overseas markets;
- maximum utilisation of existing committed infrastructure in the urban environment;
- preferred direction of urban expansion of Geelong towards Armstrong's Creek - Mt Duneed and, on the coast, in the Drysdale/Clifton Springs, Ocean Grove and Torquay/Jan Juc centres;
- retention of the option for longer-term growth in the Ceres locality;
- containment of growth in non-designated coastal towns to existing committed urban land;
- containment of residential growth in the industrial north-west sector to existing committed land;
- encouragement of the integration of conservation and heritage considerations with growth and development to achieve sustainable development;
- more effective co-ordination in the planning and delivery of human services in the Geelong Region;
- establishment of a regional 'clearing house' for dissemination of information on human services.

Figure 4 summarises the key elements of the Strategy.

A representative body should be established immediately to deal with the monitoring and review of the Geelong Region Development Strategy and Implementation Plan on an annual basis, with community input on a biennial basis.

Figure 4



1.0 Introduction

The four-document series entitled 'Geelong Region - Framework for the Future', was released for public discussion in January 1986.

These documents were the product of some two years of research and consultation with regional organisations, private sector companies, local government, state government departments and individuals.

The desire to undertake this process evolved from the Victorian Government's decision to prepare a ten year economic strategy for the State. The initiating document was 'The Next Step', released by the Premier of Victoria, the Hon. John Cain on 9th April 1984. An integral part of the State Strategy concept was the preparation of specific regional strategies. This strategic orientation has since been reinforced with the release of 'Victoria: The Next Decade' in April 1987.

In line with its role as a regional planning agency and development facilitator, the Geelong Regional Commission (GRC) was requested by the State Government to prepare Victoria's first regional economic development strategy.

Despite this being a sizeable undertaking, and without the benefit of precedent, the Commission accepted the challenge and responsibility given it by the Government.

The task associated with formulation of a regional development strategy for Victoria's second largest city and Australia's eleventh largest urban region was a formidable one. It entailed the GRC acting as a virtual 'project director' to co-ordinate wide-ranging research undertaken by various consultants. The background documentation is identified in Appendix 3 and readers are welcome to peruse any of these technical papers as desired.

'Directions: The Geelong Region Development Strategy', integrates all previous work into one document. It is the result, not only of specialised research effort, but of ideas generated from within the community at large.

In May 1985 the first public discussion document was released entitled 'Regional Overview and Issues'. This initiated a public consultation process which ultimately concluded in December 1986.

The body of material derived from the many consultant reports, agency and community submissions was co-ordinated by the GRC for a second public release in January 1986. The principal issues were organised into the following three broad elements and a discussion document was prepared for each.

Economic Development

- concerned fundamentally with achievement of sustainable economic growth, meaning new job opportunities and an increase in the net wealth of the Geelong Region.

Urban and Township Development

- concerned with cost effective urban and non-urban settlements having due regard to the need to maintain a high quality environment for both residents and visitors to the Region.

Human Services Initiatives

- concerned with identifying regional initiatives for those areas of the human services sector which will have most impact upon economic development.

A fourth discussion document was also prepared which attempted to draw the three elements together. The purpose was to establish a development focus or 'strategy' for the Region which was responsive to community aspirations and expectations.

A newspaper supplement entitled 'Geelong Region Towards 2000' accompanied the release of the four documents.



1.1 Why a Development Strategy?

The present Victorian government in its electoral statement of 1985 stated:

'Working with the Geelong Regional Commission, the State Government has funded the preparation of a Geelong Region Development Strategy ... through this regional development strategy many possible applications of the new state and regional industry policies to Geelong firms have already been identified. In our next term of government we will implement and develop this strategy further.'

To understand why a development strategy is important to the Geelong Region, as indicated in the above statement, we need to examine the two elements more closely.

* Regional Development * Strategy

Regional development in essence refers to the benefits to be derived from an expansion in the productive or employment-generating capacity of a clearly defined geographical area. This entails promotion of, and encouragement to, new business, new investment and new visitors to the Region.

The difficulty associated with regional development is the extent of emphasis that is given to the actual 'region'. Regional problems are unique but are often quite unresponsive to the implementation of conventional government policies. Business decisions are often seen to be 'region neutral'.

The resolution of regional problems needs to be co-ordinated at the regional level rather than at the state or local government level. This means also that regional development strategies will need to be implemented by the state, regional and local sectors acting in concert, with state agencies in particular operating in a regional or geographical rather than a functional way.

It is clear that regional development, and implicitly a regional development strategy, is important to the Geelong Region principally because the Region is so well defined. The Bellarine Peninsula and the Geelong hinterland provide a convenient socio-economic and planning unit comprised of the nine municipalities. There has been, and will continue to be, a commonality of heritage and economic purpose that indisputably should be maintained and developed.

A formal response period of about six months followed. A total of 52 submissions were received from a variety of governmental, industry and community groups and individuals.

The GRC undertook to hear each submitter individually, a process which occurred over some months.

The result is 'Directions: The Geelong Region Development Strategy', incorporating a broad development blueprint for the next ten years and a rolling five-year Implementation Plan. The Strategy lays the foundations, the Implementation Plan is the bricks and mortar.

The Implementation Plan will involve the community in an ongoing consultation process to ensure that the Strategy, as expressed in 1988, will remain relevant in 1998 and beyond.

The Geelong Regional Commission is pleased to have exercised its co-ordination and management roles, as specified in its enabling legislation, in this vital project for the Geelong Region.

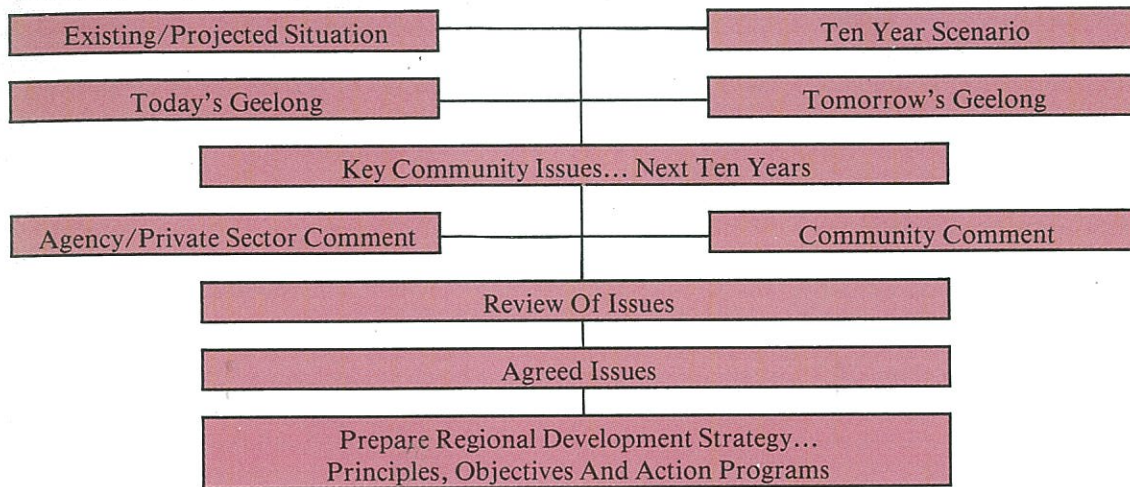
The people of the Geelong Region are assured that the GRC will continue to undertake a strategic planning role on behalf of the whole Region to ensure that the 'Strategy' remains visible and effective, and leads the community into the 21st century.

Figure 5 provides a graphic representation of the strategic planning process undertaken by the Commission.

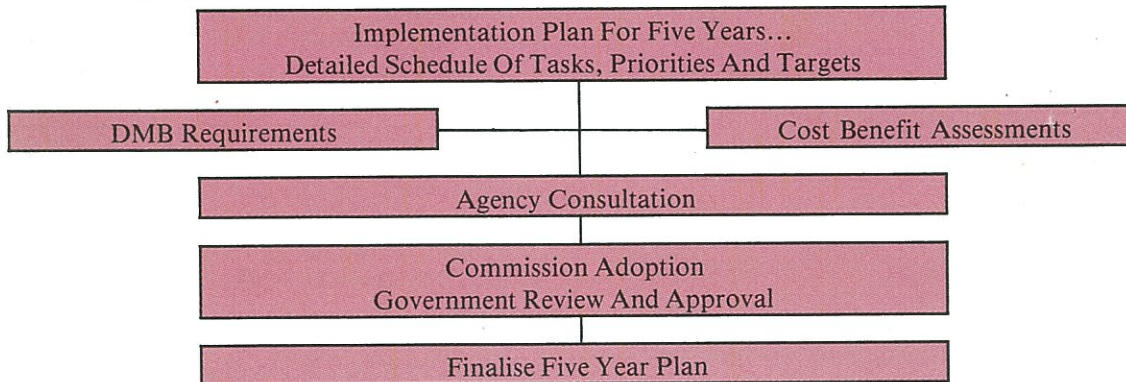
Figure 5

STRATEGIC PLANNING PROCESS

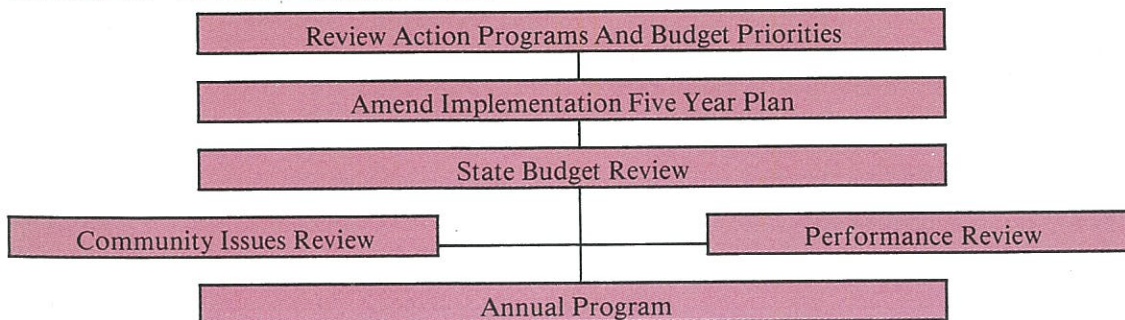
STAGE 1 - FORMULATION



STAGE 2 - IMPLEMENTATION



STAGE 3 - MONITORING & REVIEW



It is upon this rationale that 'Directions: The Geelong Region Development Strategy' is founded.

But what precisely is a strategy?

Strategies and goals are inter-related.

A **goal** is simply what we want to achieve or what we want to happen.

A **strategy** is a means to achieving that goal.

A strategy can be one strategy or it can be a number of strategies which in this document we call '**action programs**'. Our action programs can be given a collective name - '**the Strategy**'. The important thing to remember is that they are linked to the key goals.

When we get down to detail at the implementation stage - that is, who does what, when, and at what cost - we can call it a plan, the 'Implementation Plan'. But one should not confuse a 'Strategy' with a 'Plan' until such time as the flesh is put on the skeleton. This has been a failure of strategy plans in the past.

The Strategy is a guide to action.

The **Implementation Plan** is a detailed action manual.

It should be remembered that the nexus between goals-strategies-implementation is fundamental to any planning activity.

The basic purpose of planning is to attempt to satisfy future wants by predetermining a course or courses of action.

Other terms relevant to this process should also be explained.

'**Policies**' are statements of intent imposed by a body politic, such as a government or any other decision-making unit. They are a bit like goals and strategies in that they seek to influence the future. However, they are distinct from goals and strategies in that they do not necessarily derive from a strategic thinking exercise or process - one which asks what do we want in the future, how do we achieve it, and what steps do we put in place at the micro-level to ensure achievement within a specified time frame?

The 'Geelong Region Development Strategy' does not have policies as such because it is a community-based plan and from a purist standpoint there are no 'policies'.

'**Assumptions**' are statements which for the sake of the discussion are taken to be correct.

We need to make assumptions because, due to the complexity of the issues addressed by our strategy, there will always be a possibility that we are wrong whatever our efforts to minimise that risk.

The concept of '**stakeholders**' is also important. This refers to those groups or individuals with an interest in, or an intention to be beneficiaries of collective action. In respect of the regional development strategy, this concept is important for the following reasons:

- it gives meaning or purpose to the regional strategy as a community-based plan;
- it helps resolve questions of 'who pays' in regard to funding considerations for action programs;
- it helps to draw a balance between competing and often conflicting interests and helps to define the 'public good';
- it gives impetus to implementation of the strategy.

Who then are the stakeholders of the Geelong Region Development Strategy?

Because there is no formal sense of ownership contained in the concept of stakeholders (as distinct from shareholders), the whole Geelong Region community can be considered as beneficiaries. This includes employees, managers, taxpayers, ratepayers, the unemployed, the aged, the infirm and children.

Recognition of the variety of individuals or groups that may have an interest in (or be affected by) the regional strategy leads us to an even more definitive list including the following:

the 'customer' - who do we need to 'sell' the strategy to?

- the Government
- Community interest or 'pressure groups'
- the manufacturer
- the trader
- the financier
- the exporter
- the resident
- the visitor
- the tourist

The list of stakeholders may not only comprise local or domestic individuals and groups but may also include international interests. Clearly there is no simple answer to the question, 'who benefits from the Geelong Region Development Strategy?'.

However, by at least focussing on the concept of stakeholders, the scope of interest and involvement in a regional strategy process can be better understood which will hopefully lead to better assessment of priorities at the implementation stage. This means that when we know what issues are important and to whom, we have a better idea of both the financial and opportunity cost associated with their resolution. Furthermore, because governments are interested in 'who benefits' from a regional strategy, it follows that their policy statements will have a major impact upon the definition of issues and thus the composition of the strategy.

Finally, no implementation plan, and hence no development strategy, is complete without some structured means by which the plan can be monitored, reviewed and amended if appropriate. This is essential for continued relevance of the plan and its ultimate acceptance by the community.

The elements discussed above can be broadly described as a 'filter down' process descending from broad issues to micro-level tasks (Figure 6).

Figure 6 depicts the organisation of this document. Chapter Two provides the context within which the Strategy is formulated and Chapter Three outlines the necessary assumptions made regarding the context over the next decade. Regional issues are identified and considered in Chapter Four. The 'Ten Year Vision' is presented in Chapter Five and the 'Five Year Implementation Plan' in Chapter Six (the Implementation Schedules). This section of the document also details the 'Current Work Program' (1988/89). The GRC will annually update and distribute the Current Work Program. The final chapter, Chapter Seven, describes the monitoring and review process which is essential in the continued implementation of the Strategy.

1.2 Government Policy

The first Government Planning Policy directed specifically at Geelong was the 1973 Statement of Planning Policy No. 7 (Geelong) which set out that:

1. The Geelong Region shall be promoted and planned as a location for large scale urban growth including business, industry and housing.
2. The Region shall be planned to accommodate an increased share of expected growth in the Port Phillip area.
3. The planning of the Region shall ensure that acceptable environmental standards are achieved and have regard to the high quality of the environment generally.
4. The planning of the Region shall include proposals to stimulate growth and for the establishment of priorities for works by public Authorities.

However, insofar as the Geelong Region Development Strategy is concerned, the most important government policy statement to be observed is the State Economic Strategy and the associated State and Regional Industry Policies, first released by the Victorian State Government in 1984 in the document 'Victoria: The Next Step'. The State Economic Strategy has since been reviewed and in April 1987 'Victoria: The Next Decade' was published.

The State and Regional Industry Policies concentrate on encouraging the development of trade-exposed (export or import-competing) firms - either growth firms or firms in industries facing pressures for restructuring. Assistance is available for purposes such as business planning, working capital, venture capital, marketing, export development, technology transfer, product design, employee training and capital equipment upgrading.

The regional components of the policies include:

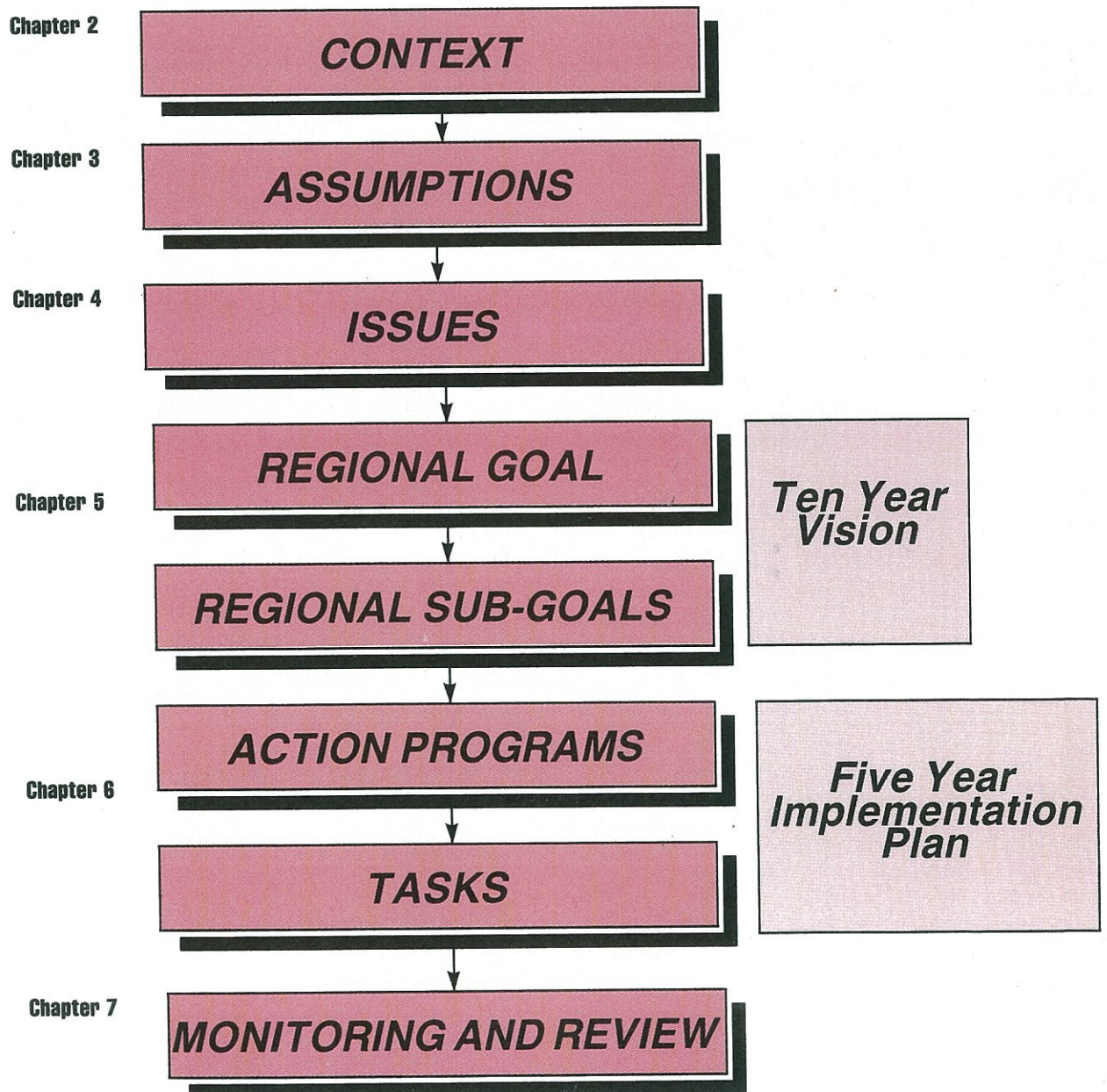
- the formulation of regional economic strategies;
- additional regional assistance for firms that particularly suit the comparative advantage of the region in question; and
- a policy of developing significant urban centres - called 'strategic centres'.

The Geelong Region Development Strategy is intended to be consistent with the State Economic Strategy and the State and Regional Industry Policies. The State Government has also been directly involved in the formulation of the Strategy.

'Directions' is, however, more than just a subset of the State Economic Strategy. There are local development opportunities and priorities to consider in addition to the application of state economic policies. The further dimension of local economic opportunity and priority can be

Figure 6

THE 'FILTER DOWN' PROCESS



added without changing the 'statewide' role of the strategy. Geelong can both 'do its own thing' and at the same time make a positive contribution to the implementation of the State Economic Strategy.

The effect of this State Government policy is to recognise the need to achieve an increase in the number of jobs in the Region and to enhance competitive strengths. These two matters provide a focus for our assessment of all issues. The development strategy is essentially an economic development strategy - its primary thrust is one of expansion of the wealth-generating capacity of the Region to assure the future of the Region as a whole. Related to the need to develop segments of the economy and thus provide meaningful employment, is the need for the public sector to participate in facilitating or assisting private business to compete effectively and grow.

It should be emphasised that the development strategy is about utilising and maximising our strengths or 'competitive advantages' and not about 'picking winners'. The latter would be clearly contrary to the State Economic Strategy and be counter-productive. The Geelong Region has a role to play in the context of Victoria as a whole, particularly in the trade-exposed sector.

At State level, the Economic Strategy is fundamentally concerned with the following:

- education and training policy (industrial skills);
- research and development policies (scientific research capabilities, technology transfer);
- regulation review and reform;
- labour and on-costs (workers' compensation, etc.);
- wages, policy and industrial relations;
- impacts of revenue and expenditure decisions on the cost competitiveness of business;
- development of capital markets;
- industry assistance policies;
- tourism development; and
- specific policy areas such as technology and the timber industry.

Other policy statements given priority by the State Government are the Social Justice Strategy and the State Conservation Strategy.

The aim of the Social Justice Strategy is to ensure equality of access by citizens to certain services and facilities and a protection of inalienable individual rights, including fair administration and opportunity for participation in decision making. Clearly this policy will have an impact upon consideration of issues in the human services field.

The purpose of the State Conservation Strategy is to ensure maintenance of essential ecological processes; preservation of genetic diversity in the natural world; sustainable use of renewable resources; wise use of non-renewable resources and protection of natural systems and their diversity for the non-material needs of society. In this context the Conservation Strategy identifies priority action programs over the next four years, including environmental education. Obviously it will have a significant impact upon the thrust of the Geelong Region Development Strategy.

'Directions' has therefore not been formulated in isolation, but within a context of government policies and community views. Figure 7 illustrates the planning process within this framework.

This introductory chapter has attempted to establish the context for a regional development strategy. One needs to reiterate the basic purposes behind such a document.

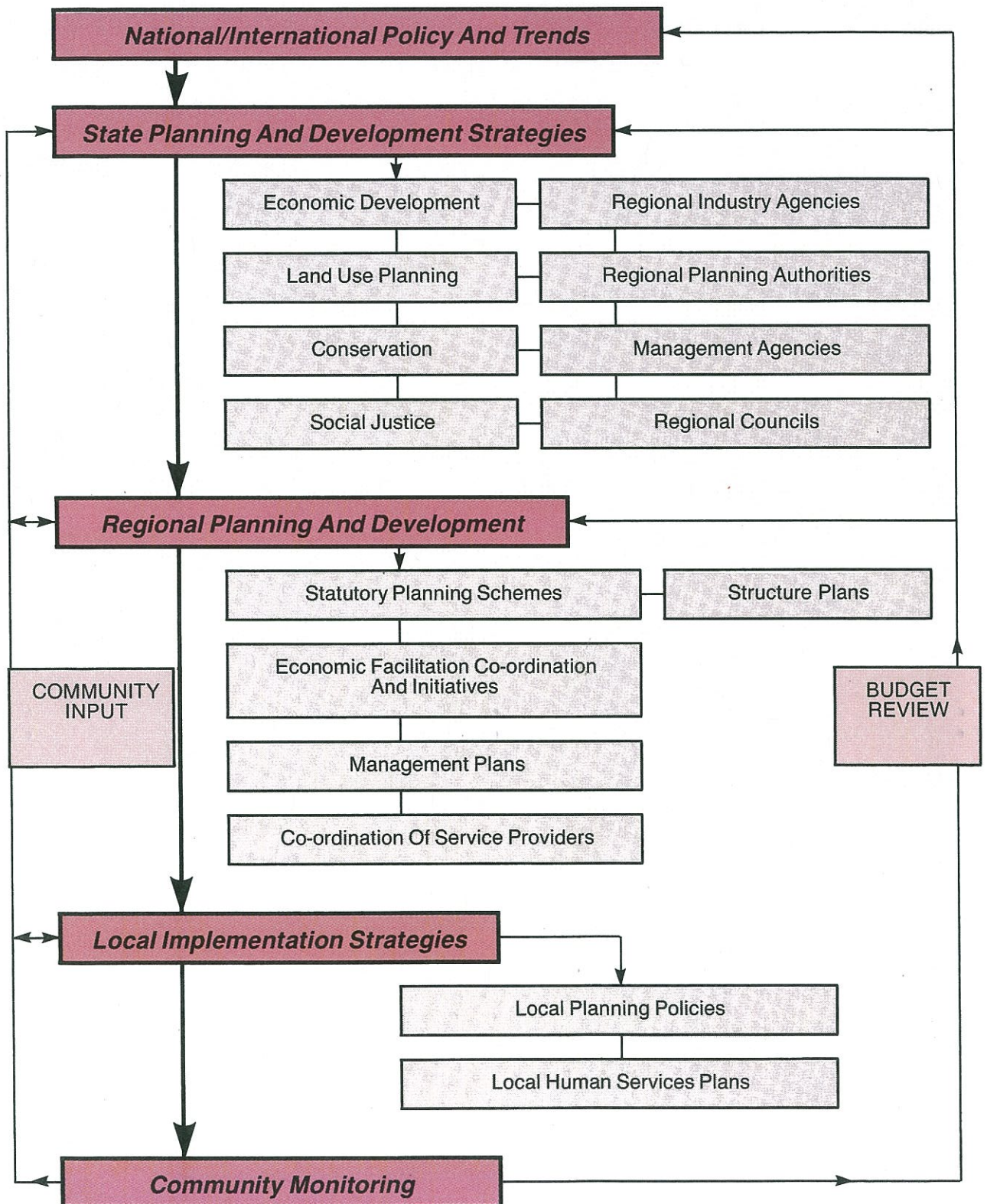
Firstly, it provides a lead for new investment by both the private sector and government in the Region (in broad dollar terms and in 'merit good' or community benefit terms).

Secondly, it provides a link between regional priorities and State and Commonwealth Government programs.

Thirdly, it provides a forum for community interest in the unfolding of the Plan. In other words, it is a basis for community consultation and involvement, to ensure the continued relevance of its action programs. The Plan is an ongoing process as shown by the attention to annual monitoring of progress and review. It is not an end state document.

Figure 7

REGIONAL PLANNING FRAMEWORK



2.0 The Context Of Change

2.1 The World

The rest of the world has always been important in the fashioning of much of Australia's economy (through trade) and culture (through immigration). Whilst these factors are still significant new influences are coming to bear on Australia. These include:

- rapid information transfer, a product of the electronic age and international travel;
- the acceleration and globalisation of international funds flow;
- the regionalisation of trade and cultural matters (particularly the Western Pacific Basin);
- increasing synchronisation and interdependence between economies (e.g. via stock markets, currency trading, interest rates).

The United States of America (USA) continues to act as a world focal point. Even though the USA's share of world Gross Domestic Product (GDP) has halved since World War II, its economy still outstrips its nearest challengers, the Union of Soviet Socialist Republics, Japan and the European Economic Community.

Growing indebtedness in the world economy, in both developed and developing countries, has taken over from the energy crisis as the principal economic cause for concern in the world today. Because of the size of the USA economy, the extent of the government and current account deficits in that country have exacerbated monetary problems worldwide and encouraged a rise in protectionism in Europe and Japan, as well as the USA. High levels of unemployment remain an intractable problem in industrialised countries, including Australia, and under-employment a major problem in developing nations. Probably more than at any other time in its short history, Australia is exposed to the vagaries of the international economy. Australia's own deficit problems, its high dependence on capital investment

generated from overseas savings and its external trade imbalance caused by frailty in world commodity markets, has impacted significantly on our economic performance and linked our future inextricably to world economic trends.

The performance of the Australian economy is still of concern in 1988. Persistent low levels of private investment, debt problems and economic restructuring collectively have the potential to seriously reduce economic activity and exacerbate unemployment.

Despite the economic dangers, there are positive signs in regard to Australia's economic future.

During the term of this Strategy - to the late-nineties - Australia is well positioned to capitalise on its fortunate position in the Western Pacific Basin. This region is the world's fastest growing one. Its combined GDP is expected to overtake that of Western Europe in 1995 and North America in 2005. Australia is rapidly integrating its trade with countries in this area. It is well placed to capitalise on growth in demand in the service sector, with dominant forces emerging in the areas of consulting and tourism.

Around four-fifths of Australia's exports are primary-industry based, be they raw or processed agricultural and mineral products. This pattern is expected to continue well into the twenty-first century due to the obvious role that our resources have to play in the Western Pacific Basin. Our tiny share of that region's population (around 0.9 per cent) precludes the likelihood of a broadly-based and internationally competitive manufacturing sector in Australia - at least not for consumer goods. Our home market is too small, as is our workforce. Further, our trading partners cannot afford our exports if we do not import their manufactures.

The old era is fading inexorably. The birth of the new era is proving painful given our nation's difficulties in confronting inevitable change. Nevertheless, there is clearly a new realization that Australia must reset its agenda for the future. There is more debate about Australia's economic role in the future and the competitive strengths it has to offer - a literate and generally skilled populace, established physical infrastructure, financial infrastructure, large well-regarded companies and diverse small businesses, well-endowed natural resources, political stability and cultural homogeneity. We should be confident that by 1998 Australia will be embraced within the world economy (and Western Pacific Basin in particular) and be well placed to achieve continued prosperity into the 21st century.

The economic changes occurring are having an impact on broader societal trends, particularly in respect of technology, employment, industry, recreation and leisure and socio-cultural attitudes.

New technology does impact upon employment. However it is doubtful whether current technology is having any more impact than labour-saving inventions - tractors, farm chemicals, production line techniques etc. - of previous generations. A more profound effect is occurring through less working hours and increased leisure opportunities.

Australia's average working week has been reduced from 70 hours in the early 1800s to 27 hours today. The '27 hours' is the result of allowing for annual leave, public holidays, sick leave, long service leave and an increasing proportion of part-time workers - and averaging these across the 52 weeks in a year. Theoretically, unemployment would be around 65 per cent today, or Australia's standard of living would be one-quarter of present levels, if Australia had not lowered the working week and embraced new technologies. While this may or may not mean a reduction in the number of hours of the formal working week in the next ten years, what is clear is that the definition of 'work' will change, and along with that, change will occur in perceptions of concepts such as leisure, work-sharing, retraining and productivity.

Australia is in a period of major transition in employment from the 'industrial' era to a post-industrial era - sometimes referred to as the 'third wave'. Barry Jones' 'Sleepers, Wake!' more precisely pinpoints the new growth sectors as information, leisure and households. Australia's previous equivalent transition was between 1890 and 1930 when we transcended national dependence on employment in the agricultural industry and slowly embraced manufacturing and retailing.

It is apparent that new social trends are emerging and that these will need to be considered in regional development strategies. Of relevance are demographic changes, particularly the larger number of persons of retirement age; increased leisure time; the expectation of a larger role of Government in social support; the changing nature of education and training, and polarisation in income and expenditure patterns.

Education is an emerging issue. Recent policy initiatives indicate a move towards a more credentialled society. This factor, along with continuing job placement difficulties, will demand an increased retention rate at schools. This in itself is likely to lower the unemployment rate and place increased pressure on secondary schools and tertiary institutions. It will also stimulate demand for teachers (particularly vocational instructors).

Post-war trends involving the state in social support can be expected to expand and lead to increased employment opportunities in the public service and community service agencies. Growth can be expected in child day-care, youth support, family support and domiciliary services for the aged.

Although evidence of lifestyle changes is not widely apparent today, this is one area where substantial change could be evident by the 1990s. It is believed by some futurists that the 'age of leisure' is commencing and that this could lead to outstanding opportunities for the development of new industries as well as leading to an acceleration of leisure-based education and recreational demands.

It is quite feasible that professionals will work from home and choose rural locations adjacent to regional cities. Clearly all these trends have important implications for the Geelong Region.

The Geelong Region Development Strategy is not only founded on the Region's role in competing in international and interstate markets, it is also cognisant of Geelong's role as a focus for South-Western Victoria and as an integral part of the Port Phillip economic system.

Examples here include the role that Geelong firms have played in supporting the Alcoa smelter development at Portland, the regional education and service centre role of Geelong and its developing dormitory role vis-a-vis Melbourne. By 1997, over 8 per cent of Geelong's workforce are expected to commute daily to Melbourne - a rise from the present level of 6.7 per cent. The potential for this dormitory role to be job-creating through local demand is obvious. Geelong can also play an increasing role as a live-in education centre for a wide catchment and the Geelong Region, especially the coastal areas, can serve as a retirement focus for the citizens of the South-West of Victoria.

2.2 The Geelong Region

The economy of the Geelong Region is manufacturing-based, the importance of which is indicated by the fact that in 1986 25 per cent of the Region's workforce was employed in the manufacturing industry. A large number of manufacturing plants in the Region are linked to nationally or internationally-based corporations. These include:

Ford Motor Co. Aust. Ltd
Alcoa Aust. Ltd
Shell Refining (Aust.) Pty Ltd
Pacific Dunlop Ltd
- Grosby Footwear Pty Ltd
- Candy Footwear
- Pulsar Battery Plant
Godfrey Hirst Australia Pty Ltd
Pilkington ACI Operations Pty Ltd
The Phosphate Co-Operative Co. Aust. Ltd
BHP Steel International - Wire Products Division
Australian Cement Ltd
Blue Circle Southern Cement
Henderson's Federal Spring Works Pty Ltd
Kortex Australia Pty Ltd
News Corporation
- Geelong Advertiser Pty Ltd
Elders IXL
- Barrett Brothers and Burston Malting Plant
- Elders Wool Handling Centre

This list includes most of the leading manufacturers (by employment) in Geelong. These companies contributed approximately 63 per cent of the total estimated manufacturing workforce in 1985.

The overall manufacturing industrial structure of the Geelong Region is a broadly based one which contributes to state, national and international markets and to a lesser extent to a local regional market.

The resident population of the Geelong Region is 179,427 people (1986 Census). The Region's share of Victoria's population has increased to 4.4 per cent and it has experienced a faster rate of growth per annum than the State. The Geelong Statistical District is the largest urban area in non-metropolitan Victoria and the 11th largest in Australia (see Figure 8).

Figure 8

GEELONG IN THE AUSTRALIAN URBAN SYSTEM		
Rank	City	Population 1986
1.	Sydney	3,430,600
2.	Melbourne	2,942,000
3.	Brisbane	1,171,300
4.	Perth	1,025,300
5.	Adelaide	993,100
6.	Newcastle	429,300
7.	Canberra	285,800
8.	Wollongong	237,600
9.	Gold Coast	219,300
10.	Hobart	180,300
11.	Geelong	148,300
12.	Townsville	103,700

Source: ABS

In the last decade the economy of the Geelong Region has experienced considerable change. Growth in the tertiary services sector, and reorientation and productivity growth in the manufacturing sector have been the main features of this change.

The economic realities of change in manufacturing have affected every developed industrialised nation in the world and are very well documented.

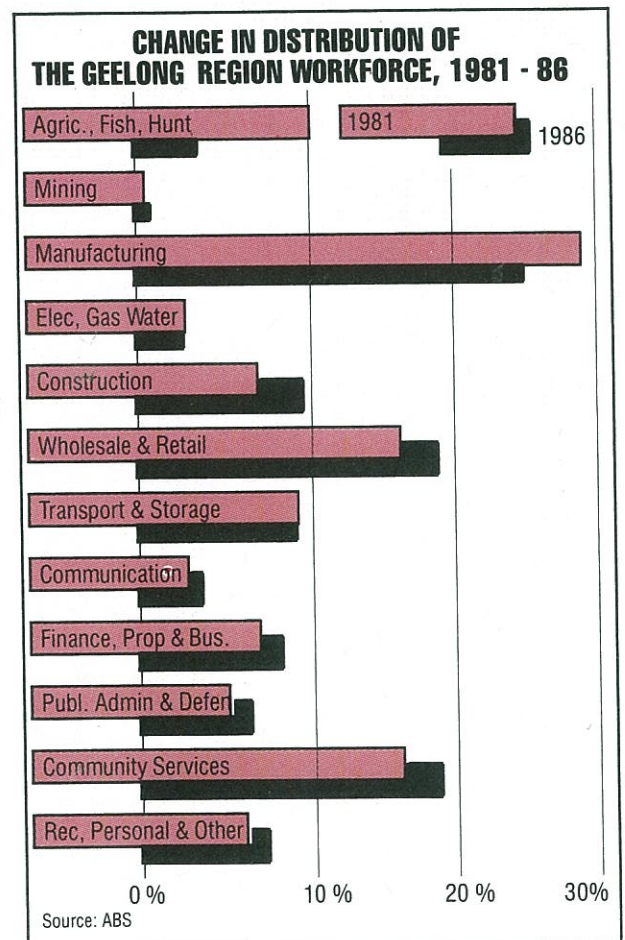
In Australia, manufacturing industry's share of the GDP has fallen from a peak of 29.4 per cent in 1959 to around 19 per cent today, and it continues to fall.

In terms of percentage of total workforce, manufacturing employs 15 per cent of the Australian total, 19 per cent of the Victorian total and 25 per cent of the Geelong Region's total workforce so that Geelong can be considered relatively more exposed to decline in this sector.

The contribution of this sector to the wider economies of the state and nation is not inconsequential. For example, in 1984-85 the Geelong Region contributed 3.3 per cent of Australia's fixed capital expenditure and 1.7 per cent of Australia's manufacturing employment, whilst having only 1.2 per cent of the population and 1.1 per cent of the labour force. The dependence of the Geelong economy on its traditional manufacturing base is highlighted also by the comparatively low share of employment in 'final services' in the Geelong Region, particularly in public administration, finance, entertainment and to a lesser extent wholesale and retail.

Figure 9 illustrates this declining dependence on manufacturing in the Geelong Region. Also apparent is the increasing importance of final services in providing employment opportunities in the Region.

Figure 9



Whilst the importance of Geelong's manufacturing sector is evident, the overall health of the regional economy will be dependent on how adaptive its manufacturing sector will be in the face of change.

Some of the changes which can be expected are as follows:

- a slow reversal to export-orientated markets (especially to Western Pacific Basin countries);
- emphasis on resources processing (especially mining, but also agriculture);
- significant investment in integrated resource extraction and processing - again for agriculture as well as mining;
- a move away from capital cities (to the resource locations);
- a move away from electro-mechanical technology to electronics, energy-intensive production and biochemical/bio-engineering technologies.

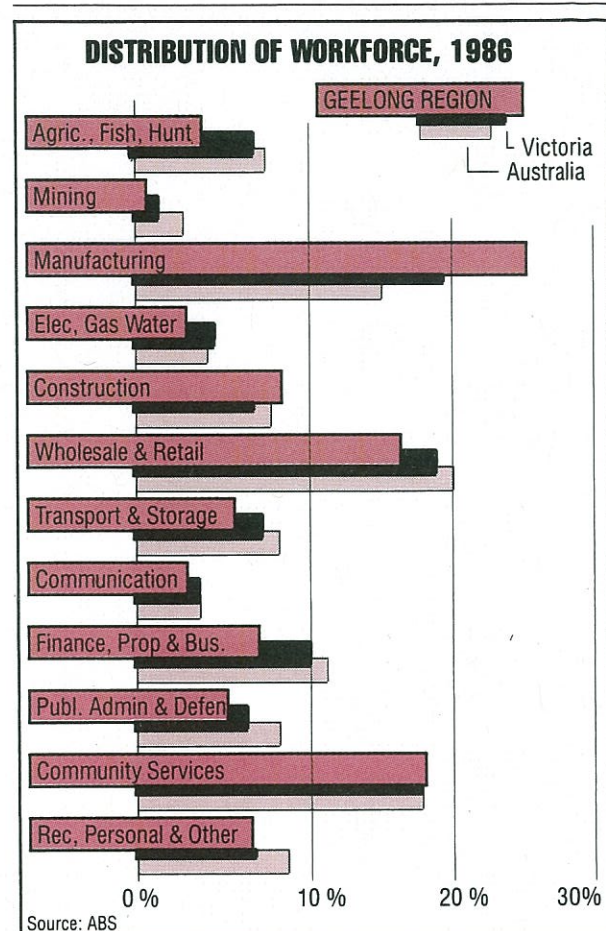
The implications that these trends will have for the Geelong Region, particularly in regard to education and training, research and development and industry assistance, will need to be given due recognition in any development strategy for the Region.

The Geelong Region's low share of employment in the tertiary sector is more than just a function of its large manufacturing employment. A significant relative shortfall in certain tertiary sector industries - notably in Wholesale/Retail, Finance, Public Administration and Transport and Storage - can be partially explained by Geelong's proximity to Melbourne and the role of the latter in the provision of higher order services, as a major distribution centre and as a centre for Government administration.

Figure 10 depicts the different composition of the Geelong workforce from that of Victoria and Australia.

The Port of Geelong plays a very important part in the economy of the Geelong Region. A large number of small and large firms in Geelong rely on imported cargoes through the Port for their production, (e.g. The Phosphate Co-operative Co.) and a small number also rely on the Port and its container handling facilities to distribute products to interstate and overseas markets.

Figure 10



The bulk commodity transportation needs of Geelong's diverse industrial community, as well as agricultural product traders from Victoria and southern New South Wales, are accommodated by the Port of Geelong and its storage, handling and repair facilities.

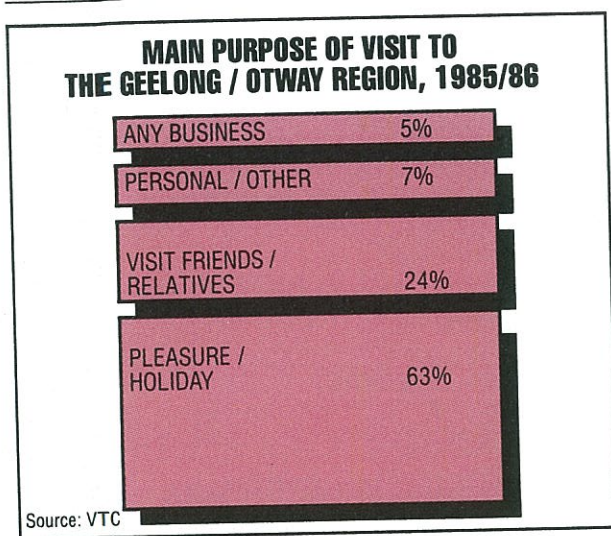
Tourism is playing a much more prominent role in the economic vitality of the Region, although it is generally conceded that the industry is undercapitalised. According to industry surveys conducted in recent years:

- there are approximately 1.1 million overnight visits to the Geelong-Otway Tourist Region per annum;
- about 70 per cent come from Melbourne and 25 per cent from elsewhere in Victoria;
- the Region is the eighth most visited in Australia;
- the average length of stay is 3.4 nights;
- a total of 3.6 million visitor nights are spent in the Region;
- there are approximately 1.5 million annual day visits to the Geelong Region;

- day visitors spend on average about \$30 per day per person in the Region (overnight visitors up to \$37 per day per person).

The main purposes of visits to the Geelong/Otway Region are illustrated in Figure 11.

Figure 11



Public sector employment in the Geelong Region represents approximately 23 per cent of the workforce. However, despite the fact that this has obviously been a growth area in recent times the Geelong Region is significantly undersupplied. Proximity to Melbourne and the significance in this region of businesses with 'outside' linkages (particularly head offices elsewhere) are important considerations in public sector activity.

It is not intended here to discuss in entirety changes affecting the Geelong Region. A wider discussion of these matters is provided in the background documentation to the Strategy (refer Appendix 3). Nevertheless, several important socio-cultural changes should be mentioned given the likely impact they will have upon development prospects in the Geelong Region. Firstly, the changing demographic structure.

Whilst the traditional family remains numerically the most significant group, its share of total households declined between 1976 and 1981 and it experienced considerably lower growth than several other family types. This change was due primarily to the higher incidence of divorce, separation, remarriage, sole-parenting and cohabitation. The largest absolute increase was in head only (single person) households, and the largest percentage increase was in single parent households (head and children only). The latter grew by 57.7 per cent between census periods, and whilst still small in terms of total numbers, single parent households increased as a proportion of total households from 3.3 per cent in 1976 to 4.6 per cent in 1981.

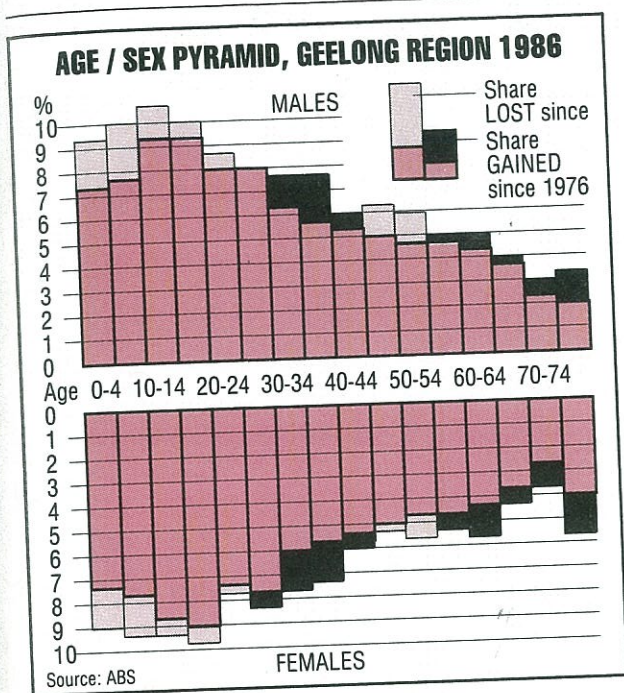
The 1986 census information, whilst not directly comparable, confirms the continuance of this trend. A corollary to the trend to more households is the trend to smaller households with the average household size declining from 3.1 to 2.9 persons per dwelling in the last intercensal period. Single person, single parent, and 'couples only' households account for a growing proportion of total households whilst larger families comprising couples and children and sometimes other adults are declining in relative importance. This will continue to generate demand for additional (and more flexible) housing stock.

A second significant change is, and will continue to be, the ageing of the Region's population.

The 1986 resident population of the Geelong Region is 179,427 and is expected to increase to 197,411 by 1996. Over the same period the aged population (those over 65 years) will increase from 11.6 per cent to 13.2 per cent. In 1986 there were 20,594 aged persons in the Region and this is expected to rise to 26,031 by 1996. This constitutes a 26.4 per cent increase in the number of people aged over 65 years in the Geelong Region with all the attendant demand for increased services.

The significant growth in the aged population over the last decade is illustrated in Figure 12.

Figure 12



Of more significance than the total growth of the aged population, however, is the change within the various age cohorts. Whilst the size of the population aged 65-69 years is expected to increase by 19.5 per cent between 1986 and 1996, the population aged over 80 years will increase by nearly 50 per cent. Thus it can be expected that there will be a significant increase in those age groups which will potentially require more intensive support services and facilities.

Finally, one of the main purposes of a development strategy is to identify the best areas for long term urban development and to accommodate population growth. It is also imperative to safeguard the development potential of land which will be required for urban expansion during the specified period. The 'lead time' for conversion of broadacre land into residential allotments, for example, is currently 10-15 years in the Geelong Region. During the term of the ten year Strategy, therefore, we will need to predict land requirements for 25 years hence.

The Region has plentiful supplies of residential land in the short to medium term in almost every possible development location. Based on current trends, there is enough land contained in committed urban zones to last well past the year 2000. Nevertheless, growth projections cannot be made with total surety given the propensity for change that we have discussed including change in economic conditions, greater demand for multi-unit housing and redevelopment of existing stock, continued growth in number and diversity of households and lifestyle changes.

The development strategy will need to build upon an impressive commitment to planned new development in the Region in recent years, as evidenced by the following achievements, activities and projects:

- in the two years 1984-1986 \$157 million investment in non-residential commercial and industrial building (including Government) and \$142 million investment in residential building, creating some 3,000 new full time jobs;
- between 1984 and 1986 the establishment of some 21 new companies in Geelong and creation of 789 full-time jobs as a direct result of public sector business assistance and investment facilitation;
- retention of the manufacturing asset of the International Harvester plant ('Harbourside Industrial Complex');
- establishment of the Barrett Brothers and Burston malting facility, the Elders IXL wool-handling facility and the Dunlop Pulsar Battery factory resulting in the creation of 98 jobs;
- major capital works at the Port of Geelong, including grain terminal works and the Bay City Marina;
- major progress on City By The Bay including completion of Market Square, imminent completion of the 'Bay City Plaza' project and the National Wool Centre, completion of the first stage of foreshore landscaping and a major office block development planned for Eastern Beach in 1988;

- commencement/completion of many significant State and Commonwealth capital works projects which have expanded employment opportunities, improved infrastructure and broadened the economic base of the Region. Examples here include the upgrading of the rail service to Melbourne, the Latrobe Terrace Overpass and the Barwon River Crossing projects, the North Wing of Geelong Hospital, major works at Gordon Technical College, the Australian Animal Health Laboratory, the Institute of Educational Administration, the Netball Centre, Corio Police Headquarters and the State Correction Centre and Training College at Lara;
- establishment of a major skills centre at Ford Australia and Alcoa of Australia;
- establishment of leisure and life-style oriented developments at Torquay (Surf Coast Plaza), Lorne (Cumberland), Queenscliff (hotel refurbishments) and Whittington (Shire of Bellarine Leisure Centre) and major new developments proposed such as the international hotel on Western Beach Geelong, Port Bellarine at Portarlington, and Lonsdale Lakes residential development.

The Geelong regional economy will continue to benefit from the flow-on effects generated by projects of state and national significance.

The City By The Bay project, in particular, will serve to enhance the image of Geelong and attract a considerable amount of new spending into the Region.

In addition to major new retail investment, the introduction of a regional television service would serve to reduce the extent of retail expenditure loss from the Region.

These activities and projects suggest that there will need to be continued close co-operation between the public and private sectors to promote the cause of sustained economic development in the Region. The public sector's role has been to establish basic development infrastructure and to assist in, or facilitate, new business investment (that is, provide 'seed capital' for business development). This role will continue to be a vital one but it must be emphasised that the Strategy is predicated on strong private-sector led investment in the regional economy over the next ten years. Success will depend to a large degree upon the private sector capitalising on the competitive strengths of the Region with government in a support role. 'Directions' provides investors and local entrepreneurs with this opportunity. Success will also be based on the need for development to be sensitive to the environment, both natural and built, so that one of the major sources of attraction to the Region is not diminished.

3.0 Assumptions

In the formulation of a regional development strategy, it is necessary to make certain assumptions given the complexity and uncertainty of the future. These judgements will need to be reviewed regularly just as the Strategy itself will be assessed and revised over time. The assumptions will be both general and specific and relate to the world at large as well as to matters affecting development in the Geelong Region.

Our assumptions for the next ten years are listed as follows:-

- in view of continuing conditions of economic restraint in the state and national governmental sector, agencies will work within tight budgets for capital works and other expenditure areas;
- the general economic and political situation affecting regions such as Geelong will be one of relative stability and the panoply of economic variables such as interest rates, exchange rates, inflation and employment levels will point to an economic environment not significantly worse than at present;
- Commonwealth Government changes to fiscal and monetary policy and policy decisions taken by major companies overseas will not significantly impact upon the Geelong regional community as a whole or upon the operations of existing government agencies;
- the domestic and export markets of both manufacturing and agricultural products will not be subject to major growth;
- the annual population growth rate in Australia will rise and continue to exceed the annual population growth rate of the Geelong Region (which will vary between 0.8-1.8 per cent per annum);
- household formation will exceed the population growth rate given the trend toward smaller household size and the rate of growth of persons of child-bearing and marriageable age;
- there will be growth in the number of persons aged 65 years and over in the order of 2.9 per cent per annum;
- there will be no great change in income or consumption expenditure variables but there will be increased private expenditure on services;
- the workforce participation rate in the Geelong regional economy will not fall from its existing rate due to employment structure changes and increased numbers of persons of working age;
- the total manufacturing workforce will remain relatively stable;
- there will be no loss of a major employer to the Region;
- there will be some increase in leisure time available for the working population;
- education retention rates will be maintained or increased and there will be continuing demand for technical, further and advanced education;
- the Port of Geelong will not grow significantly in terms of tonnage throughput or direct employment;
- there will be continuing emphasis on services growth in the Region and in professional and technical occupation groups;
- there will be an increased level of commuting of the workforce, both into and out of the Geelong Region;
- there will be an increase in interest in quality residential development in the Geelong Region;
- there will continue to be a gap between the demand for appropriate accommodation in the Region and the capacity of the housing sector to satisfy that demand;

- there will be increased emphasis upon community-based care rather than institutional care;
- there will be continued growth in the adoption and application of new technology in existing markets and products;
- the Geelong Regional Commission will remain the regional planning authority for the Geelong Region as defined;

- there will be no significant alteration in the structure of municipal areas in the Geelong Region as defined;
- the global economy, including the Western Pacific Region, will continue to exert competitive pressures upon reliant communities with continuing inter-relatedness in markets and products.

The principal assumptions are summarised and represented diagrammatically in Figure 13.

Figure 13



4.0 Regional Issues

4.1 Strengths and Weaknesses of the Geelong Region

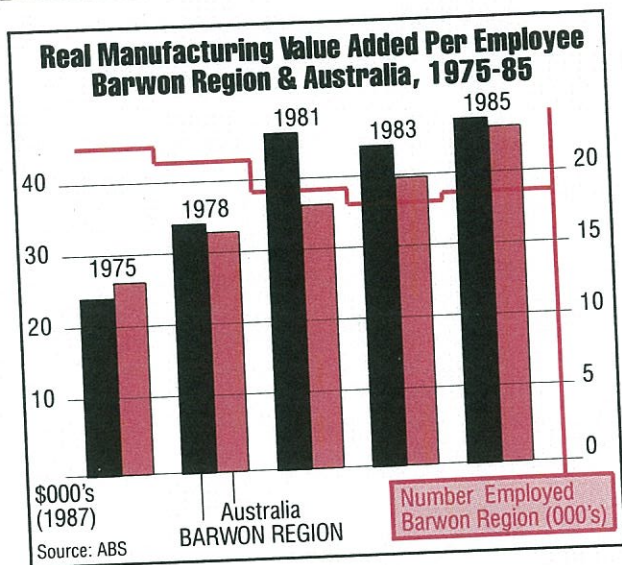
Before we can identify the key issues confronting the Geelong Region in the 1990's and beyond it is necessary to briefly consider the strengths and weaknesses of the regional economy. It should be noted that a fuller discussion of these matters can be found in background documentation to the Strategy, as identified in Appendix 3.

Whilst the manufacturing sector can be seen to be declining only slightly in employment terms, the growth in the labour force has resulted in a relative decline in importance of this sector. This relative decline is particularly noticeable in a regional economy which has been dependent for many years on this large employment sector. In 1971 manufacturing industries employed 35.8 per cent of the workforce. By 1976 this had declined to 32.0 per cent, in 1981 to 28.5 per cent and in 1986 to 25 per cent (see Figure 9). Whilst significant intra-regionally, this decline is modest when one considers the decline in manufacturing employment levels statewide. The decline is also an indicator of the rate at which the Region's manufacturing industries are adapting to new methods of production.

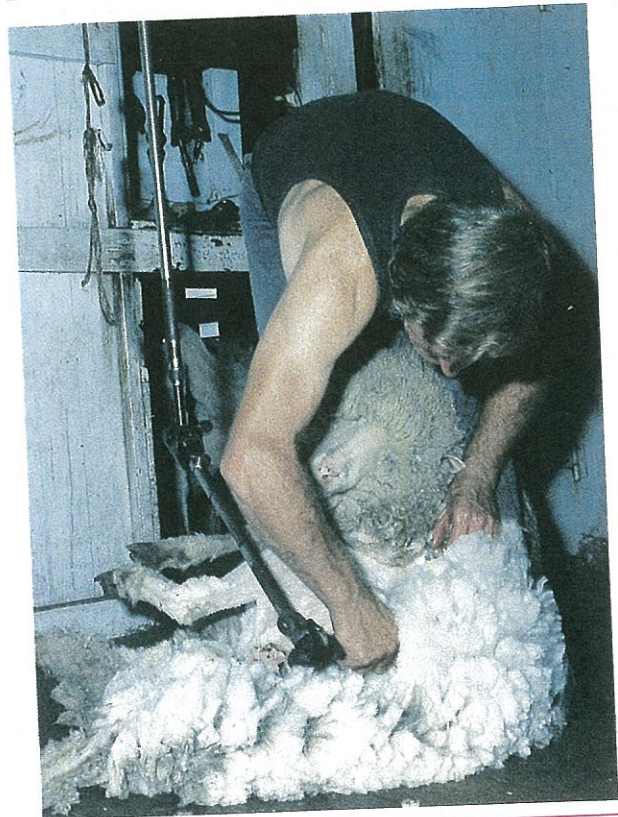
The manufacturing sector remains an extremely significant part of the regional economy, providing the impetus for overall economic growth within the Region through a multiplier effect. This has, in part, resulted in the growth of service sector employment, particularly in retail, distributive and business support services. The demand for more skilled labour and relative decline of the blue collar component are corollaries of this trend.

Technological change is occurring in the Geelong Region at a rapid rate. A number of Geelong manufacturing enterprises are becoming more efficient and using relatively less labour whilst still increasing the value of production. In recent years Geelong's manufacturing industry has increased the value of its output at a faster rate than Australia as a whole (see Figure 14).

Figure 14



The relative deterioration in Australia's terms of trade in recent years has placed significant pressure on our export and import competing industries - the so called 'trade-exposed' sector.



The need for additional private sector investment in manufacturing and other trade-exposed industries is apparent. Furthermore, restructuring of the manufacturing industry is needed over time so that our productive capacity and processes are geared more to what our external customers demand. Without this attention to customer needs in the external sector, our exposure to the risk of recession and protracted unemployment will be greater, and the task of long-term restructure made more difficult.

Despite these real challenges facing the Geelong Region, the Region's recent economic performance suggests an encouraging outlook for the future.

Situated around the shelter of Corio Bay, the Port of Geelong is one of the Region's significant assets and gives the Region a fundamental comparative advantage over many other regions. Whilst the Port itself is a major regional asset, its proximity to road and rail facilities and to industrial land, provides Geelong with a major combination of facilities for future exploitation. Geelong already has statewide significance as a grain handling facility, and through the construction of the Elders IXL wool handling stores, Barrett Burston malting plant and the continued existence of Shell, Phosphate Co., and Alcoa, the Port may also experience the benefits of future multiplier effects.

There are other competitive strengths of the Region which are relevant to economic performance, as follows:

- the availability of specialized agricultural, mineral and marine resources which are linked to the industrial base and other regional strengths;
- the strength and stability of the industrial skill base and existing workforce diversity;
- the availability and proximity of a number of high quality tourism and recreational features, particularly the surf beaches and coastline, Corio Bay, the Otway Ranges, the Barwon River and the Bellarine Peninsula;
- the advantage of proximity to the major commercial centre and markets of Melbourne;
- the attraction of the quality of life offered by the Geelong Region (city size, education and cultural facilities, access to capital city, proximity to coast and rural environments) for business and for retirees in particular;

- the presence of leading scientific and post-secondary educational institutions, such as the Australian Animal Health Laboratory, Deakin University and the Marine Sciences Laboratory;
- the existing transit services linking Melbourne and Geelong and the car ferry linking the Mornington and Bellarine Peninsulas;
- the network of social support services in the Region.

Identifiable weaknesses are as follows:

- growth in aggregate productivity in the Region has largely been influenced by the performance of a small number of industry groups, indicating the need for continued growth in value of output to maintain jobs;
- fragmentation and low investment in the tourism industry;
- most of Geelong's major manufacturing industries are branch plants of nationally or internationally-based parents with head offices in the capital cities;
- the limitation of Corio Bay to accommodate panamax-type vessels without additional dredging of channels;
- the lack of a regional television service to gain exposure to markets in the Western District and to minimise 'escape' expenditure to Melbourne;
- despite a growth in business-related services, much of the potential for these 'advanced' tertiary services continues to be lost to Melbourne;
- lack of a regional airport providing direct-link air passenger services to major cities;
- low level of tertiary qualified people per head of population;
- need to further improve co-ordination of the delivery of human services;
- need for additional support services for the aged given the growth in number of persons 65 years and over, particularly in the upper end of this age cohort.

4.2 Opportunities and Threats

Now that we have assessed the strengths and weaknesses of present day Geelong, it is appropriate to ask what development opportunities will present themselves and what threats will confront Geelong in the next ten years? We can do this by looking at the key sectors.

Agriculture

Agriculture will experience significant product mix changes involving a new emphasis on crops and horticulture rather than livestock or livestock products. This will more than likely contribute to a further reduction of employment opportunities in this sector. Grains and oilseeds (including new types) are emerging in a new-look industry as it enters a new area of growth in the twenty-first century. The continued development of infrastructure at the Port of Geelong for the movement of agricultural products and materials is fundamental to Geelong remaining a major Victorian port and Victoria's main grain exporting location in particular.

The development of horticultural and aquacultural products within the Region are exciting new growth areas of business activity. However, the extent to which these developments can become alternative activities for small holding farmers cannot as yet be predicted with certainty. Agricultural research and state regional industry restructure programs will be important considerations in this regard.

Manufacturing

Views have been expressed that manufacturing in the Geelong Region will enter a new growth cycle around the end of the century. For Geelong to benefit from this forecasted growth, continued development of the Region's well diversified industrial base is essential.

In order that the Geelong manufacturing sector obtains the maximum value from emerging technologies, the research activities of regional academic and scientific organisations must be integrated with the activities of local manufacturing companies.

New technology being introduced to major firms such as Ford, can point the way to product diversification and product and service opportunities for the Region's small businesses. The encouragement of additional or new component manufacturing and services to supply major companies such as Ford is required.

Intensive job retraining will be essential if the Geelong workforce is to keep pace with technological change. This will mean the development of additional flexible on-the-job training schemes (such as those recently introduced at Ford and Alcoa) in addition to broader initial training courses at the Gordon Technical College (TAFE). A broader, higher profile will be needed in job training and retraining.

The introduction of new companies to the Region must be maintained. However, priority must be given to those trade-exposed companies which can capitalise on the locational advantages that the Region offers.

The Port of Geelong will remain a major asset. The Port offers linkage to export markets and the development of port-related industries.

Downstream processing of raw materials and goods produced in or transported through the Region is an opportunity.

Geelong will become an attractive alternate operational location for Melbourne industries pressured by incompatible development.

The State Regional Industry Policies will assist in industry restructure and help smaller type companies in the private sector to establish.

On balance, it is anticipated that the manufacturing workforce will remain essentially stable over the next ten years.

Wholesale/Retail

A major influence on employment in the Wholesale/Retail sector over the decade to 1998 will be the growth in specialty shopping. A danger is increased leakage to Melbourne as the Geelong-Melbourne rail service improves. Currently 'escape expenditure' is about 10 per cent of total retail spending in the Geelong Region. The Market Square, Bay City Plaza and other City By The Bay projects and a regional television service for Geelong would greatly minimise this loss.

Around 10 per cent of retail spending in Geelong is captured from non-residents. The Strategy is directed at maintaining and attracting additional spending from South Western Victoria and tourists.

It is unlikely that there will be any major technological changes in Australian retailing which would have significant land-use implications over the next 5-10 years. This applies to Australia as a whole as it does to Geelong.

The Wholesale/Retail industry can be expected to be moderately important in providing new jobs to 1998.

Transport and Storage

Key influences on employment growth in this sector over the next decade will be increased regional specialisation in production and increased transport (i.e. the quantity of goods moved will grow faster than production); the success of the Port of Geelong in achieving extra throughput in the face of pressures for rationalisation of the Victorian ports system; development of a local airport with major commercial services; development of specialist delivery and courier services targeted at the local business market; and the effect of Melbourne-Geelong rail standardisation on distribution-warehousing patterns.

Transport and storage is expected to be a minor contributor to growth in the workforce.

Finance, Business Services and Property

Although this sector experienced strong growth between 1971 and 1986 the number of persons employed remains low due to the higher order business and service role of Melbourne and the branch nature of the Geelong economy. In 1986 the Geelong Region had 28.9 jobs per 1000 population compared to 52.0 for Melbourne and 43.2 for Victoria. Property and business services accounted for over half of the employment in this sector in Geelong in 1986. These areas should both experience strong growth in the coming decade - in the case of business services well ahead of population growth. This is a key part of the 'information economy', in which most employment growth will be concentrated in all advanced economies.

Overall, the finance, business services and property sector is predicted to be the largest private sector employment growth generator in the Region in the ten year period.

Public Administration and Defence

The public sector has played a major role in job creation over the past decade. However, there will be further pressure for cost rationalisation in most public sector agencies and departments. Nevertheless there is still scope for regionalisation of government departments such as the Taxation Office. The State Government has also emphasised the importance of aerospace and defence offset industries in 'Victoria The Next Decade' and the Aerospace Technology facility at Avalon is likely to play a prominent role in this development.

Community Services

Community services between 1988-1998 are expected to account for the largest growth in all the industry sectors in the Geelong Region. This anticipated growth is likely to be based on an expansion of jobs in teaching, health, child care and related occupations. This again emphasises the importance of adequate training programs.

There will be a need for improved co-ordination in the delivery of human services especially for programs which cross departmental boundaries. Given likely budgetary pressures in the public sector and given that demand will always exceed supply, better ways will need to be found for employing available resources and greater use of private sector funding.

Tourism

Background research to the Strategy has indicated that tourism in the Geelong Region deserves special attention over the next ten years. There will be a need for infrastructure and promotional activities to develop the tourist industry.

Funding of promotion and market research for regional tourism must be addressed by the people of the Geelong Region. The Victorian Tourism Commission will continue to undertake the promotion of Victoria as a whole. However, it is unlikely that the State Government will increase its financial assistance for direct promotion support of areas such as the Geelong Region.

Most visitors to Geelong visit the natural features of the Region. To date there has been very little development expenditure on manmade tourist attractions. The Strategy will need to consider the means by which a mature tourist industry can be developed which will integrate the natural attractions of the Region with tourism developments, e.g. fauna parks, theme parks.

The tourist industry in the Geelong Region is generally under-developed. There is an absence of:

- quality coastal developments;
- low cost accommodation such as cabins or high quality permanent caravans;
- low cost accommodation targeted at the international and interstate youth markets such as youth hostels and 'hike and bike' camp grounds;
- expenditure on tourist road landscaping and urban design of tourist resorts;
- promotion of the Region especially to interstate and overseas markets;
- community awareness of tourism benefits.

A problem in the development of coastal resorts is that the tourism season is relatively short and this affects the economic viability of tourist developments.

The Central Activity Area (CAA) of Geelong, namely the central business district and adjacent Corio Bay foreshore, has not maintained its once strong appeal as a tourist destination. In this regard the City By The Bay project is important as it is aimed at creating an environment in Geelong which will provide a strong appeal for single destination tourists and those holidaying in the Region's coastal areas. The entrances to Geelong, especially the Melbourne Road strip, will need beautification through more extensive landscaping in both the public and private land areas.

Tourism is expected to be a strong employment provider.

Urban Development

The Geelong Region Development Strategy will be more able to influence the direction of urban development in the Region than many of the other elements discussed. This is primarily

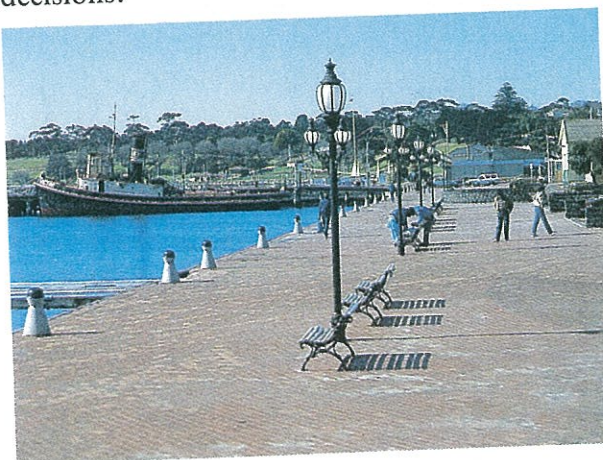
because of the operation of the Geelong Region Planning Scheme. However, because the separation of land uses inherently generates conflict, a delicate balance will need to be struck by planning authorities in guiding future development of the Region.

It is likely that local government will play a dominant role in the control of land use and development at the local level. It is imperative, however, that there is scope for overview of issues and effective co-ordination at a regional level to ensure that balance and consistency is achieved in the Region as a whole.

There will be two basic choices for future urban growth in the Geelong Region: to provide for the continued dispersal of growth on a large number of development fronts in urban Geelong and throughout the Region, or, to consolidate future development within established urban areas, providing for additional growth on a limited number of growth fronts.

The increased suburbanisation of the Region's coastal towns will reduce their attractiveness as holiday resorts and may reduce the contribution they make to the Region's economy. Permitting incremental growth in the Region's townships will offer a wide choice of living environments but at the expense of efficiency in the provision of publicly funded infrastructure. On the other hand, placing excessive limits on the growth of particular townships to ensure a resort or rural village character will result in higher land and housing prices which is undesirable.

Irrespective of whether a development strategy is based on a policy of dispersed or consolidated growth, urban development has and will continue to be influenced by a number of extraneous factors, including market preferences, physical land suitability, servicing costs, and previous development and planning decisions.



If unchecked, the continued decline of the population in the inner suburbs of Geelong will lead to under-utilisation of established physical, commercial and social infrastructures. Population growth in the older areas will need to be stimulated by substantial additions to the existing housing stock if it is intended to arrest this decline.

It will be important that a far wider range of accommodation be provided in the Region, particularly in the coastal towns, and a more innovative approach be adopted to housing provision in the future.

The setting aside of further land for residential or rural-residential expansion in the northern industrial sector is likely to conflict with future industry and economic initiatives. Also, development of substantial industrial estates within coastal and rural areas in the south-east sector will conflict with residential environments and the resort role of coastal towns.

The continuation of the present shift of residential growth away from central and northern employment areas will tend to increase loads on the arterial road system and lengthen trip journeys if employment opportunities are not created in developing areas. The location of major new industries to the south and east of Geelong, however, would place them at a significant transport disadvantage with respect to links with Melbourne and the Port.

The further industrialisation of the Corio Bay and Barwon River frontages will tend to conflict with the desire to improve Geelong's image and integrate these features with the non-industrial urban environment.

Indiscriminate use of the coast for camping, access roads, and urban development will detract from its recreational and tourism role. However, prohibition of some established foreshore activities, such as camping, will alienate many visitors. Further development within the Barwon and Moorabool River valleys and in the Lake Connearre and Reedy Lake catchments may significantly degrade these natural assets, although increased access is justifiable from the point of view of equality of opportunity for access to recreation.

Human Services

In the research and consultation phases of the project a detailed review was undertaken of high priority human services needs in the Region and it was established that there would

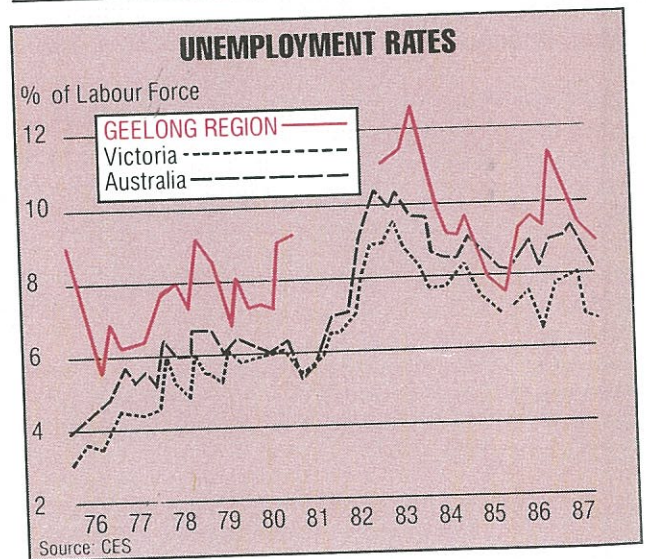
be a need for an integrated set of programs targeted at particular sectors of the population. Some of the key indicators which lead to this conclusion are based on the projected demographic composition of the Region and broader indicators such as poverty, public housing demand and related socio-economic factors.

Housing, for example, will require particular attention. In 1984 there were 2,737 Ministry of Housing houses and flats in the Geelong Region and 1,657 applicants on a waiting list for accommodation. There are over 4,000 households eligible for Ministry of Housing accommodation in the Region, which means that the number of potential applicants is 1.5 times greater than the total available stock.

Measures of poverty reinforce the need for services. According to research by the Department of Community Services, there were 10,679 families (16.8 per cent of the total) in the Barwon Region in June 1981 living below the poverty line. It is likely that the situation will have further deteriorated since that time.

As at 30th September 1987 there were 6,360 unemployed persons in the Geelong area. While there has been a decline in unemployment rates in recent months, at 8.1 per cent it is still unacceptably high (see Figure 15).

Figure 15



The effect of these figures is to demonstrate that the need for family support services and facilities will become more acute. The coastal areas in particular have a high retirement potential, but additional services will be required if that potential is to be realised.

There will be a need to improve the quantity, quality and scope of services for older people in Geelong and for people with disabilities.

At the opposite end of the age spectrum there will be a need to provide continuing support for children in crisis. Residential child care, providing care and protection to children and young people 'at risk' in their own family situation, will become increasingly important. Children will need to be accommodated in a variety of residential facilities including congregate care, family group homes and adolescent units.

At the post-secondary education level, there will be a continuing need to develop close links between regional economic development and labour force training.

Regional Development Funding

By the year 2000 the Geelong Region's population will exceed 200,000. It is clear that in the last twenty years Geelong has become a complex and increasingly sophisticated community. Greater mobility has increased the interdependency of the Region's economic structure and social life with, for example, the major coastal settlements becoming commuter towns. Consequently the demands for services and facilities by the community will become so complex that the cost-effective solution will be to provide regionally organised services. However, development of equitable funding mechanisms will be more difficult to achieve.

Regional facilities which enrich the social and cultural life of the Geelong community, as distinct from Melbourne, will continue to face this same dilemma. Essentially they service a regional population but are heavily reliant on annual and sometimes fluctuating contributions through municipalities. Indeed, individual municipalities have a growing concern about the equity of funding regional facilities that are located within the particular municipality or elsewhere.

This issue will need to be addressed if community expectations are to be fulfilled at the regional level.

We have now set the world, national and regional context for development in the Geelong Region. The next step is to identify issues which will form the basis of the Geelong Region Development Strategy.

4.3 Consideration of the Issues

The identification of key issues is never an easy task given that community expectations do change over time. However, it is important that these issues remain pertinent over the life of the Plan through regular review otherwise community acceptance of the Plan will be eroded. To indicate the complexity of the key issues facing our Region, a series of questions can be posed. We then can attempt to address such issues and indicate where programs of action might be directed.

Should we target existing strengths in manufacturing or diversify our base?

- Manufacturing is the largest single industry sector in Geelong and, given that it is experiencing declining employment and restructuring, action programs are needed which capitalise on existing strengths of the sector and which create new opportunities, particularly in high value added export or import competing areas.

How can we reinforce tertiary sector growth?

- Tertiary industry is becoming increasingly important in the Geelong economy but participation rates are considerably lower than those of Melbourne. Action programs need to reinforce tertiary sector growth, particularly in relation to information services.

How can we encourage greater regionalisation of state government departments?

- In recent years, public sector growth has underpinned employment growth in the Geelong Region. Programs therefore need to focus on those sectors of the regional economy (particularly private sector business and professional services) which will stimulate growth. More complete regionalisation of State Government departments is needed.

How can we establish closer relationships between the port and export related industries?

- Given the potential for trade in the Pacific Basin, the Port of Geelong is a major regional asset which needs to be capitalised upon. Measures are required to establish the relationship between Port and export-related industry and to consider means of improving the competitive position of the Port.

Do we need to better co-ordinate the planning and delivery of human services or do we leave it to existing mechanisms?

- Given that community services are expected to account for the largest growth in all industry sectors in the Geelong Region, action programs are needed which ensure appropriate co-ordination in the planning and delivery of these services.

How do we ensure optimum contribution to regional development on behalf of youth, the aged and groups outside the existing workforce?

- There is a need for targeted support services for some families, children, youths and older people. It is important that this need be recognised and that the scope of services is adequate to support people wishing to relocate or retire in Geelong.
- State department and local government programs which assist older people and people with disabilities (such as the Home and Community Care Program) are now in place. In this area responsible authorities will need to:
 - improve co-ordination of services for the aged;
 - upgrade the level of services currently provided, including public transport services;
 - introduce a comprehensive assessment program to avoid misallocation of the available limited resources;
 - upgrade and introduce new facilities within the context of likely available resources;
 - upgrade and introduce new services especially in coastal towns and other areas where older people live.
- A significant demand for appropriate residential care services exists in the Geelong Region, especially amongst adolescents. Community Services Victoria is active in both deinstitutionalisation and support for people in need. It is important that further programs be implemented to overcome the problems of child neglect or abuse.

Should the community contribute to funding for promotion and facilitation of regional development e.g. tourism, parks?

- A continuity of funding for regional development and promotion is required if community needs are to be realised at a regional level. This will mean some contribution to the provision of facilities and services beyond current levels if the Geelong Region is to simply maintain its position.

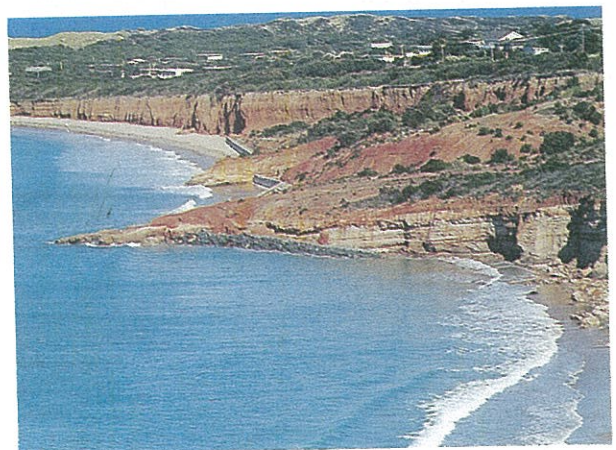
- As one example, the tourism industry offers major potential for regional development in line with the Region's physical attractions and change in leisure patterns. Specific programs will need to realise this opportunity and support new investment through promotional activity. Also important will be the need for major man-made attractions and the visual enhancement of tourist routes, including the Melbourne Road corridor.

Should we promote employment growth through part-time work, job-sharing and job retraining at the workplace?

- The apparent low level of job retraining, especially at the work place, affects the preparedness of the Region to cope with economic growth and to take advantage of the trend to more flexible work arrangements. This is an issue requiring specific attention.

How far can we integrate Geelong into the Port Phillip transport and distribution network without risking our separate identity?

- There is a 'near-yet-far' effect caused by the proximity of Melbourne to Geelong. Strategies need to maintain and develop the link with the Port Phillip region, particularly in respect of promoting the lifestyle benefits of the Geelong Region, as well as maintain an effective physical separation between the centres.



To what extent can we facilitate commercialization of innovative ideas and ventures?

- There is a need to establish a link between research institutions and commerce/industry to achieve optimum technology transfer and high-tech product development.

Can we achieve economic development without major environmental cost?

- Economic development, particularly tourism development, will necessitate some level of impact upon areas of natural sensitivity and/or heritage. Strategies need to recognise this conflict and maintain the delicate balance through quality development in appropriate locations.

Do we allow dispersal or consolidation of urban growth in the region?

- Population growth has slowed meaning that much of the land that was zoned for urban development when growth expectations were high in the late 60's and 70's, has still not been taken up. In fact, region-wide, there is enough land committed in vacant Residential and Future Urban zones to accommodate growth at current levels past the year 2000. In this regard, monitoring of land stock will be needed to ensure adequate supply.
- Restructuring of the manufacturing industry base of the Geelong Region will focus greater attention upon industrial land requirements.

Is it possible to arrest inner urban population decline?

- Households are becoming smaller, therefore the dwelling mix will need to be more varied to satisfy changing needs.
- Given that Geelong's inner suburbs have experienced a substantial population decline, there will be an increasing capacity for redevelopment and infill in these suburbs, and wider scope for innovative housing projects attractive to newer residents.
- The need for adequate shelter is critical. In this regard, housing support programs will need to take account of:
 - the need for more public housing;
 - particular strategies to assist youth and single parent families;
 - measures to increase the availability of low rental private housing stock.

How do we ensure continuity of appropriate skills in the regional workforce?

- The expansion of educational opportunities is critical to a more adaptable workforce. At the post-secondary education level, there is a close link between regional economic development and labour force training. Whilst moves to co-ordinate educational planning between Deakin University and Gordon Technical College (TAFE) are worthwhile, co-ordination will need to go further. In this regard, there is a need to:
 - provide a broader range of post-secondary education options;
 - facilitate a continuum of higher education in the Region;
 - cater for some specific academic areas not adequately provided for by existing programs;
 - expand the availability of tertiary education places and widen access;
 - extend and strengthen the co-ordinated planning for post-secondary education needs;
 - meet the educational demands generated by various sectors of the regional economy.

Is it legitimate to limit coastal and rural township growth?

- Location preferences are changing, and a number of coastal and rural towns, as well as 'rural-residential' areas, are exhibiting population growth rates well in excess of urban Geelong. This means that the continued dispersal of growth on several 'development fronts' will be cost inefficient, on the following grounds:
 - there will be slow rates of development in a number of areas and long lead times for the establishment of community and commercial facilities and for the build-up of 'complete' urban areas;
 - there will be heavy demands on public funds for roads, social and utility services in many different locations concurrently;
 - there will be heavy demands on the major link roads between Geelong and the coastal and peripheral towns and longer journeys to work. Strategies therefore will need to take account of the cost inefficiencies associated with dispersed urban developments.

5.0 The Ten Year Vision

The consideration of issues in Chapter Four provides us with a broad ten year vision which can be stated as follows in figure 16.

Figure 16

THE TEN YEAR VISION

- Concentrate On Developing Specific Strengths Of The Regional Economy, Particularly In Relation To Manufacturing, Port Related Investment, Research And Tourism
- Develop Orientation To Rest Of The World, In Particular Markets In Western Pacific Basin
- Develop Orientation To Port Phillip Bay And The Western District Of Victoria
- Promote Natural Assets To Outsiders
- Adopt A Least Cost Approach To Expansion Of Urban Geelong
- Retain Long Term Options For Alternative Quality Accommodation Close To Geelong
- Encourage Intensive Coastal Settlement Only In Designated Centres
- Maintain Rural Environment On Bellarine Peninsula And Geelong Hinterland
- Attract Quality Tourist Developments In Appropriate Locations
- Protect Significant Natural Features Of The Region
- Encourage Growth To Take Account Of Conservation And Heritage Considerations To Achieve Sustainable Development
- Encourage A Co-ordinated Approach To Human Services Planning And Vocational Training
- Promote Self-determination And Independence In Regional Community Life
- Promote Benefits Of Geelong As A Region And Discourage Provincial Town Image
- Promote The Manufacturing Sector To Maintain A Stable Workforce

The Geelong Region Development Strategy is primarily concerned with the addition of new wealth to the community and the capacity of individuals to exercise choice and share in that wealth. Because the main thrust is economic development, it is important not to view the document as an all-encompassing blueprint for all activities in the Region. In economic terms, it concentrates on those issues that really matter in the next ten years.

The regional goal reflects this as follows:

Regional Goal:

To increase the capacity of individuals within the community to exercise choice, principally through the generation of wealth in the regional economy and through optimum development of community resources .

The major goal in regional economic development for 1988-1998 is to achieve improved job growth in the Geelong Region consistent with enhancement of the Region's high quality of life. The major benefits from efforts aimed at seizing economic development opportunities will be the creation of jobs for citizens of the Geelong Region. The primary goal of economic development is therefore to produce sufficient jobs to cater for likely future labour force growth.

Given forecasts of labour force growth in Geelong, a sustained reduction in unemployment levels and a satisfactory rate of growth in employment would be achieved if at least 10,000 extra jobs were created in the Region over the 10 year strategy period from 1988-98. This is an achievable growth target.

Existing manufacturing industries must be capable of responding to the changing competitive environment in their industries, as well as developing opportunities through product diversification. The local economy must be aware of the potential for developments in business and professional services, tourism, leisure industries, education and community services. It must be prepared to meet the challenge of designing a relevant education and training strategy for the Region. The Region must also be prepared to express its views on issues surrounding national industry and trade policies - particularly industry plans and changes in protection policies.

The regional economic sub-goal can therefore be expressed as:

**Sub Goal:
Competitive Advantage**

To increase employment and maximise linkages and skills in those industries in the Region where an existing competitive strength is identified.

We can identify key competitive advantages which form the economic core of the Geelong Region Development Strategy. It is in these areas that Geelong's greatest gains from specialisation exist and that State Government support for the Strategy is anticipated. There is a **direct link** between the competitive advantages identified and the action programs outlined in the plan. Such a direct link is essential if a consistent flow-through from State Economic Strategy to Regional Strategy is to occur.

The ten year economic development strategy is therefore built on the following **competitive advantages** of the Geelong Region:

- the **availability of specialised agricultural, mineral and marine resources** which are linked to the industrial base and other regional strengths;
- the **benefit of a sheltered port** with specialised bulk handling facilities and supportive infrastructure;
- the **strength, stability and linkage of the industrial skill base**;
- the **proximity of a number of high quality tourism and recreational features**, particularly the surf beaches and coastline, Corio Bay and the Otway Ranges;
- the **proximity to the major commercial centre and markets of Melbourne** (i.e. 'near yet far');
- the **quality of life offered by the Geelong Region** (city size, education and cultural facilities, access to capital city, proximity to coast and rural environments), to footloose business - given that 'objective' location cost factors would seem likely to be in balance on a comparison with Melbourne for many such firms;
- the **presence of leading scientific and post-secondary educational institutions.**

An important aspect of the Geelong Region Development Strategy is the orderly and balanced utilisation of the land resource into the next century. This means that we need to identify where growth is to occur over the next 25 years or so by which time the Region's population will have increased from 180,000 persons to between 240,000 and 280,000 people. We need to look at 25 years hence rather than just 10 years due to the 'lead time' or advanced planning involved in the provision of basic services for development. Also we need to provide a framework for long-term investment decisions by the public and private sector in the location of major roadworks, utility services, commercial centre development, residential and industrial development, and in conservation and open space investment.

The ten year strategy will not only complement and guide the day-to-day statutory planning framework provided by the Geelong Regional Planning Scheme, but also provide a more visionary base for desirable change and action over the next few years.

The regional land use and development sub-goals can therefore be expressed in terms of the cost-effectiveness of urban development and the assurance of a quality environment as follows:

**Sub Goal:
Cost Effectiveness**

To provide and utilise basic community infrastructure such as roads, sewerage, water, hospitals, schools and parks, at least cost and in a manner which will maximise the choice available to people who want to live, work and recreate in the Region.

**Sub Goal:
Quality Environment- Physical**

To protect the main natural features and assets of the Region including the ocean and bay coasts and the Barwon-Moorabool River system, and to enhance the use or appreciation of landscapes, buildings and open spaces which are, or could be, of recognised importance to the community.

The physical land use and development element of the Strategy is predicated upon the desirability of providing urban infrastructure at least cost to the community, and protection and enhancement of the Region's assets.

The ten year strategy is therefore based upon the following elements:

- the restriction of residential growth to the north, northwest, and west of Geelong to current urban zones (the Outer Freeway Reservation), because of natural and developmental constraints, and to minimise conflict with strategic industrial areas;
- the development of new growth areas to the south (Armstrong's Creek/Mt Duneed), and potentially in the longer term to the southwest of Geelong (Barrabool Hills), in accordance with comprehensive development plans. These sectors offer the most attractive urban environments but they are unlikely to be required for development until after the year 2000, given existing urban zone commitments;
- the concentration of coastal growth in the main centres of Drysdale/Clifton Springs, Ocean Grove and Torquay/Jan Juc, and the containment of growth in other coastal towns within presently zoned land;
- the provision of a greater variety of dwelling stock, particularly an increase in medium density units, by redevelopment and infill in the inner suburbs and provision in coastal and new development areas;
- the development of the resort and recreational role of the coastal areas including major opportunities for visitor accommodation;
- the concentration of rural and rural residential growth around existing settlements which have established services;
- the development of a hierarchy of sub-regional and community centres by focussing on the expanded role of the Geelong CAA under the 'City By The Bay' scheme;
- the concentration of industrial growth in the North Corio sector, close to port and Melbourne transport links, and the preservation of expansion possibilities for major industrial concerns in this area and at Pt Wilson;
- the preservation of the Lara-Little River corridor for broadacre industrial, special and farming uses as a buffer to possible future expansion of the Melbourne Metropolitan Area;

- the development of Deakin University to the southwest of Geelong for educational and technology enterprises;
- the increase in capacity of major transport routes including the Princes Highway between Geelong and Melbourne, Bellarine Highway, Portarlington Road and Torquay Road;
- the prevention of indiscriminate subdivision in non-urban areas and the maintenance of farming activities;
- the improvement of Geelong's urban image;
- the conservation of significant natural features and natural habitats - the coastal primary dunes, Swan Bay and the lower Barwon estuary, the You Yangs and Brisbane and Otway Ranges.

The next 10 years should be a period of consolidation, in which land already committed for residential development should be progressively taken up and developed - 'developed' in a far more complete sense, with the provision of better and more efficient social, commercial and transport infrastructures, private and public landscaping and a sense of community. The consolidation of development in the Region's large number of development areas can only be achieved if new development zones are limited to areas where there is a demonstrable need.

The Physical Framework Plan (inside back cover) indicates the main features of land use and development as envisaged for the Region in the next ten years.

The Geelong Region Development Strategy recognises that economic, physical and social issues are interrelated. Whilst improvement to the regional economy is considered to be the principal means of improving quality of life, it is recognised that there is also a need to take relevant action in areas of particular social need.

The co-ordination of planning for human services was identified in the research undertaken for the Geelong Region Development Strategy to be a primary need. It is proposed as a priority of the Implementation Plan to convene a working party of relevant Government and non-Government agencies which in turn will establish a regional human services committee to advise, co-ordinate and monitor human services planning in the Geelong Region. The Committee will be an important forum for discussion between the major government departments, voluntary and private organisations and local government.

The second major need identified is the establishment of an integrated data bank to provide regular key indicators on human services. This service will act as a clearing house for data and provide a single, identifiable source of human services data. The data would include information on health, community services, industry, employment, unemployment and training.

The Social environment sub-goal is expressed as follows:

**Sub Goal:
Quality Environment - Social**

To ensure that the social development of the Region is assisted by efficient planning and delivery of human services.

The regional human services strategy can be simply expressed as:

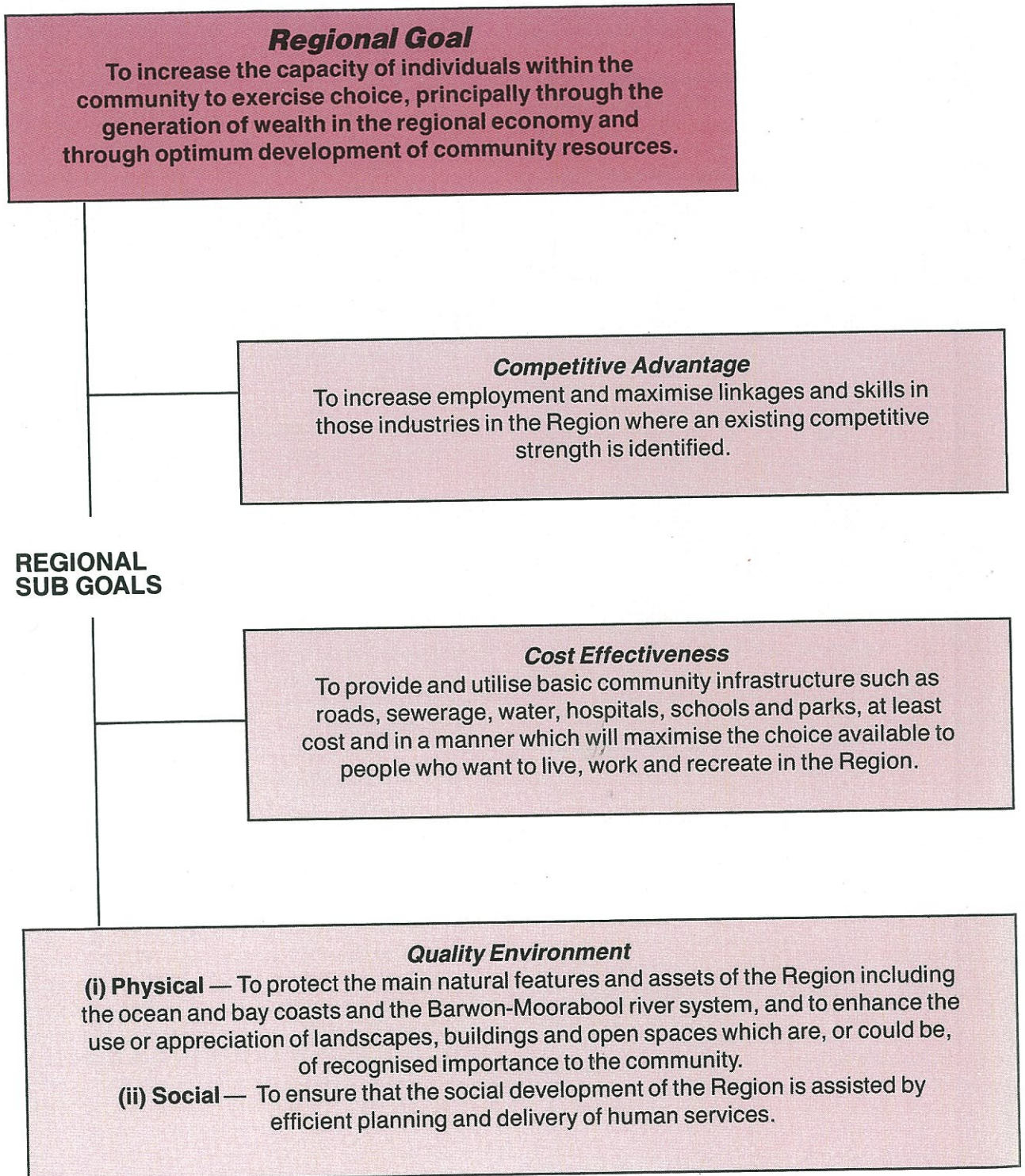
- the co-ordination of human services planning and delivery;
- the establishment of a regional data bank for human services.

The Regional Goal and Regional Sub-Goals are presented in Figure 17

The broad thrust of the ten year vision is now in place. It remains for us to provide a detailed Implementation Plan for the first five years of the ten year strategy.

Figure 17

REGIONAL GOAL AND REGIONAL SUB-GOALS



6.0 The Five Year Implementation Plan

Implementation is integral to the success of any strategic planning process. It is at this point where we need to turn broad strategy into specific actions. The 'filter down' process of determining micro-level tasks from broad issues was shown in Figure 1.

The schedules in the following pages constitute the major part of the Implementation Plan. The schedules refer to a five year planning horizon rather than ten years. This is because the specific delineation of tasks beyond five years would be too speculative. Given that we have a broad ten year strategy, we will be able to put a second five year implementation plan in place for 1993/94 and beyond.

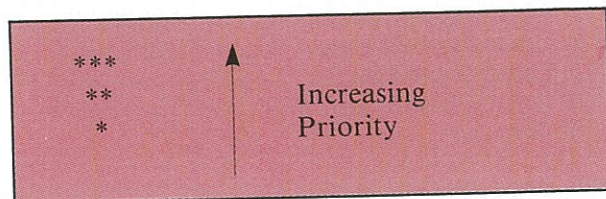
The five year plan is from 1988/89 to 1992/93. The schedules provide an outline of tasks associated with each action program or strategy. The relevant regional sub-goal is referenced. In addition, indicative measures are used to evaluate the progress of each program. The indicative measures may not directly relate to each action program but in overall terms they provide a reasonable yardstick of performance for the Plan.

The tasks explain in detail the nature of the action program - who does what; when it is programmed to begin (year 1 or years 2-5); the priority of the task within that year or years; and the funding implications and/or costings involved where appropriate.

The derivation of each action program (in terms of support documentation), is also indicated for reference purposes.

The 'Current Year Program' follows the schedules of the five year plan. It incorporates more detailed funding and cost estimates for the current year work program (in this case Year 1, 1988/89).

Tasks delineated under the current year program and Years 2-5 of the five year plan are broadly prioritised as follows:



The GRC will update the Current Year Program annually as part of the ongoing monitoring and review process.

(Note: a geographical summary of the five year plan was shown in Figure 2.)

Note:

The Implementation Schedules referred to in the text have been omitted from this reprint.

"Directions: The Geelong Region Development Strategy - Five Year Implementation Plan" is published annually as a separate document available from the Commission.

The first update, 1989/90, was published in December 1989 with the 1990/91 review due for release later this year.

June 1990

7.0 Monitoring And Evaluation

The schedule presented in Figure 18 indicates how the Geelong Region Development Strategy will be monitored and reviewed.

This final stage of the strategic planning process is of critical importance if the progress of the Implementation Plan is to be measurable and if community acceptance of the approach is to be maintained.

The monitoring of the Plan involves two concurrent processes:-

1. monitoring the progress of action programs and tasks;
2. evaluating the extent of achievement, including revision of tasks, programs and goals as appropriate.

It should be noted that in the implementation schedules in Chapter Six a number of bodies are involved in monitoring and evaluation activities. Some of these bodies do not presently exist and their establishment is primarily in accordance with the need to provide regional co-ordination and overview of an action program.

In terms of actual monitoring activity on an annual basis, however, it is felt that existing co-ordinating bodies would best serve the purpose of monitoring and review of the Plan. These bodies include:

- The Geelong Co-ordinating Group;
- The Geelong Regional Commission.

It is appropriate that an industry body also be involved in monitoring and review - the main organisations in the Geelong context being the Victorian Employers' Federation, the Australian Chamber of Manufactures (Geelong), the Geelong Chamber of Commerce and the Metal Trades and Industry Association; an employee body, most likely the Trades Hall Council; an education/training body such as the TAFE Regional Council; and a community based human services body such as the Barwon Region Consultative Council.

The preferred approach is to establish a representative body of all these organisations to meet annually for the purpose of reviewing the Plan. This body should be formed immediately. It would need to rely on the above-mentioned organisations to monitor progress in allocated areas and report to the review body at the annual meeting. The review body would prepare a report for public release on progress of the Plan and outline any variations it deems appropriate. This would be one significant way in which the community can be informed on the matter. A second responsibility of the review body would be the setting of task priorities in the Current Year Program for the oncoming year.

Also important is community input into the monitoring and review process. This could be done biennially with the review body seeking input/comment on the progress of 'Directions' prior to its own evaluation.

Only by a commitment to monitoring from the above-mentioned organisations will the performance of the Plan be fairly judged and the strategic process itself work.

Otherwise, the Geelong Region will find itself again in a few years time in need of direction because of the significant changes occurring in our society. If the Plan has been laid to rest, as is often the case, the whole process of research, consultation, goal-setting, strategy and implementation will need to be started again from scratch. Rather than being in charge of its future, the Geelong Region will be continually behind changes already occurring. Therefore, the community of the Geelong Region must take an active interest in its future to ensure optimum benefits are achieved from our resources and advantages.

Figure 18

Monitoring And Evaluation Schedule

REGIONAL SUB-GOAL:		ANNUAL PROGRESS				INDICATIVE MEASURE-COMMENT	GAPS IDENTIFIED/ REVIEW OF PROGRESS
		ACTION PROGRAM	Tasks Completed	Tasks not Completed	Tasks 'In Train' or carried forward		
No	Description						

Appendix 1

Glossary Of Terms

Action Program	Action Programs tell us how goals will be achieved. They are a guide to action. For the purposes of this document collective action programs can be deemed to form 'the Strategy'.
Aquaculture	Aquaculture refers to the husbandry or cultivation of resources in an aquatic environment.
Arterial Roads	Arterial roads are main roads usually meaning freeways, highways and other principal routes specified in the Geelong Regional Planning Scheme.
Assumptions	Assumptions are statements relevant to a discussion or issue which are taken to be true.
Designated Coastal Growth Areas	Designated Coastal Growth Areas are the towns of Drysdale/Clifton Springs, Ocean Grove and Torquay/Jan Juc which constitute the preferred areas for new coastal development as demand for such development requires.
Export Facilitation	Export facilitation refers to government assistance to new and fast-growing small to medium-size firms which have the potential and/or capacity for expansion into export markets.
Extended Care	Extended care for the aged entails a range of locally-based home-care and related services which form part of the community supports required to maintain older persons in their homes and which reduce the trauma associated with institutionalisation.
Final Services	Final services refers to the Wholesale and Retail, Finance, Public Administration, Community Services and Entertainment sectors of the industry groups.
Geelong Region	The Geelong Region consists of the municipal districts of: City of Geelong City of Newtown City of South Barwon City of Geelong West Shire of Corio Shire of Bellarine Shire of Barrabool Shire of Bannockburn Borough of Queenscliffe and, for planning purposes the surrounding waters as defined under the Planning and Environment Act 1987.
Geelong Regional Planning Scheme (GRPS)	The Geelong Regional Planning Scheme comprises statutory documentation (ordinance and maps) and procedures for the purpose of control of the use and development of land in the nine municipal areas defined as the Geelong Region.

Goal	A goal (or objective) is a statement or description of a desired future that is achievable and preferably measurable over a period of time.
Household Formation	Household formation is the creation of new 'households' (meaning a single person or association of persons formed for economic and/or socio-cultural reasons). A household will 'form' primarily by single persons leaving the family home and marriage and death within existing families or household units.
Implementation Plan	The Implementation Plan outlines detailed tasks linked to regional goals and incorporates responsibilities, agency and private sector involvement, priorities, timing and funding considerations.
Infrastructure	Infrastructure refers to the range of utility services and structures which are usually seen to be necessary pre-conditions for the development of an urban community. Includes roads, railway, power and telephone, sewerage, drainage and water supply, as well as hospitals, schools, parks and street lighting (often called 'social capital').
Productivity	Broadly, productivity is the measure of how much output is being achieved per unit of input. Inputs are anything which contribute to the production of a good or service and include labour, management, raw materials and new technology.
Reservation	A reservation, in the context of the Geelong Regional Planning Scheme, is made when land is, or will be, required at some future date for public use or for the purposes of a public authority. Reserved land is now, or prospectively, in public ownership. (See distinction with zone).
Residential Child Care	Residential child care refers to home or community-based care rather than centre-based child care.
State Economic Strategy	The State Economic Strategy comprises a series of documents prepared by the Victorian State Government which provide an economic blueprint for the State based on its competitive strengths and resource potential.
State and Regional Industry Policies	State and Regional Industry Policies are a cornerstone of the State Economic Strategy. They comprise a package of business-related assistance and advisory facilities administered by the State Government and designed to improve the competitiveness of the Victorian 'trade-exposed' sector.
Strategic Planning	Strategic planning refers to a process of pre-determining a course or courses of action based on assumptions about future conditions or trends which can be imagined but not predicted with any certainty. Strategic planning is usually reflected in the setting of goals, objectives, strategies and tasks by both individuals and organisations.
Strategy	The 'Strategy', in the context of the Geelong Region Development Strategy, is a collective of action programs which are the means by which regional goals will be achieved over a ten year time frame.

Structure Planning	Structure planning refers to a process of co-ordination, integration and management of urban settlements usually by means of a physical outline of facilities and services which serves as a framework for future development.
Sub-Regional Centre	A sub-regional centre serves a population catchment larger than a community or neighbourhood centre but smaller than a regional centre. It is 'sub-regional' in the sense that the centre relies on a retail 'anchor', as does a regional centre, but one which is not likely to exceed 5000 square metres in area.
Technology Transfer	Technology transfer is a generic term applied to the application (and awareness) of emerging technologies on an intra-national and industry-wide basis. It may include overhead analysis, just-in-time techniques, inventory control and total quality control.
Trade-Exposed	The trade-exposed sector of industry is one which directly competes with producers from other states in Australia and with producers in other countries, both in local and overseas markets.
Transport Interchange	A transport interchange refers to a central facility or terminal which allows the convenient transfer of passengers from one mode of transport to another.
Urban Consolidation	Urban consolidation entails a policy process for reversal of inner urban population decline, including more flexible housing forms and adaptive use of under-utilised land and buildings.
Value-Added	Value-added is the basic measure of an industry's contribution to total production. It is defined as turnover (sales and other operating revenue) plus the increase in the value of stocks (or minus the decrease) less purchases, transfers-in and expenses.
Western Pacific Basin	Western Pacific Basin usually describes an international region following the western rim of the Pacific Ocean and incorporating some thirteen nations stretching from Japan and the Republic of Korea southward to Australia and New Zealand.
Zone	A zone is a mechanism of statutory planning schemes. Its purpose is to assign land to broad descriptions of use or intent in order to express planning objectives or policy and ensure compatibility between neighbouring activities. The basic rationale of zoning is the separation of dissimilar uses as the primary means of land use control.

Appendix 2

Glossary Of Acronyms

AAHL	Australian Animal Health Laboratory (CSIRO)
ABA	Australian Bicentennial Authority
ABS	Australian Bureau of Statistics
ACM	Australian Chamber of Manufactures (Geelong Branch)
AHC	Australian Heritage Commission
AIDC	Australian Industries Development Corporation
AP	Action Program
ASA	Australian Surfriders' Association
ATS	Australian Traineeship System
AWB	Australian Wheat Board
AWU	Australian Workers' Union
B/SWHSLC	Barwon/Southwest Human Services Liaison Committee
BHSRC	Barwon Health Services Regional Council
BRCC	Barwon Region Consultative Council
BRHC	Barwon Regional Housing Council
C of C	Chamber of Commerce (Geelong Branch)
C. GOV'T	Commonwealth Government
CA	Competitive Advantage
CAA	Central Activity Area
CBTB	City By The Bay
CE	Cost Effectiveness
CES	Commonwealth Employment Service
CRIS	Centre for Research on Intelligent Systems (Deakin University)
CSIRO	Commonwealth Scientific and Industrial Research Organisation
CSV	Community Services Victoria (S. Gov't)
DARA	Department of Agriculture and Rural Affairs (S. Gov't)
DCFL	Department of Conservation, Forests and Lands (S. Gov't)
DEIR	Department of Employment and Industrial Relations (C. Gov't)
DITAC	Department of Industry, Technology and Commerce (C. Gov't)
DITR	Department of Industry, Technology and Resources (S. Gov't)
DMB	Department of Management and Budget (S. Gov't)
DOA	Department of Aviation (C. Gov't)
DOH	Department of Health (S. Gov't)
DOL	Department of Labour (S. Gov't)
DPS	Department of Property and Services (S. Gov't)
DSR	Department of Sport and Recreation (S. Gov't)
DURAC	Deakin University Research and Consulting Company
DWR	Department of Water Resources (S. Gov't)
EPA	Environment Protection Agency
GDWB	Geelong and District Water Board
GEB	Grain Elevators Board
GEC	Geelong Environment Council
GRC	Geelong Regional Commission
GRPS	Geelong Regional Planning Scheme
GTC	Gordon Technical College

GTecc	Geelong Technology Centre
GTS	Geelong Transit Service
HACC	Home and Community Care Program
HBC	Historic Buildings Council
HSLC	Human Services Liaison Committee (see B/SWHSLC)
ITEC	Information Technology Centre (Geelong)
L. GOV'T	Local Government
LCC	Land Conservation Council
MOE	Ministry of Education (S. Gov't)
MOH	Ministry of Housing (S. Gov't)
MOT	Ministry of Transport (S. Gov't)
MOV	Museum of Victoria
MPE	Ministry for Planning and Environment (S. Gov't)
MTA	Metropolitan Transit Authority (Melbourne)
MTIA	Metal Trades Industry Association
NIES	National Industry Extension Service (joint C. Gov't & S. Gov't)
NWC	National Wool Centre
OIDS	Office of Intellectual Disabilities
PGA	Port of Geelong Authority
QE	Quality Environment
QE-P	Quality Environment - Physical
QE-S	Quality Environment - Social
RCA	Road Construction Authority
REIV	Real Estate Institute Victoria
RSL	Returned Servicemen's League
RTA	Road Traffic Authority
RWC	Rural Water Commission
S. GOV'T	State Government (Victoria)
SBDC	Small Business Development Corporation
SEC	State Electricity Commission
STA	State Transport Authority
TAFE	Technical and Further Education
TEC	Tertiary Education Committee
THC	Trades Hall Council
VEDC	Victorian Economic Development Corporation
VEF	Victorian Employers Federation
VFF	Victorian Farmers' Federation
VIC	Victorian Investment Corporation
VTC	Victorian Tourism Commission
YEDO	Youth Employment Development Office

Appendix 3

Technical Papers

No.	Subject	Prepared By
1	Proposal	Geelong Region Commission
2	Today's Geelong	
(a)	Executive Summary	Kinhill Stearns
(b)	Infrastructure	Kinhill Stearns
(c)	Human Services	Kinhill Stearns
(d)	Economy	Kinhill Stearns
(e)	Employment and Training	Geelong Regional Commission
(f)	Demography and Forecasts	Geelong Regional Commission
(g)	Public and Major Private Capital Expenditure	Loder and Bayly
3	Geelong in Tomorrow's World	DURAC/Dr J. Remenyi (Deakin University)
4	Tomorrow's Geelong	Loder and Bayly
5	Key Regional Issues Regional Overview and Issues (Public Discussion Document)	Kinhill Stearns Kinhill Stearns and the Geelong Regional Commission
6	Economic Development	
(a)	Geelong Firms Survey	Rob Carter and John Stanley
(b)	Economic Infrastructure	Rob Carter and John Stanley
(c)	Regional Tourism	Rob Carter and John Stanley
7	Regional Economic Development	Rob Carter and John Stanley
8	Human Services Initiatives	Sach Associates and Human Services Working Group
9	Regional Urban and Township Development	Neilson Associates
(a)	Development Trends	Neilson Associates
(b)	Natural Planning Constraints	Neilson Associates
(c)	Geelong Region Service Infrastructure	Neilson Associates
(d)	Land for Future Urban Growth In the Geelong Region	Neilson Associates
(e)	Urban Development Considerations and Key Issues in the Geelong Region	Neilson Associates
(f)	Evaluation of Options for Regional Growth	Neilson Associates

(g)	Geelong Urban & Township Development Strategy	Neilson Associates
10	Strategy Co-ordination	David Hain
11	Geelong Region : Framework for the Future (Public Discussion Documents)	Geelong Regional Commission
	Development Strategy (No.1)	Geelong Regional Commission
	Regional Economic Development Strategy (No.2)	Geelong Regional Commission
	Urban and Township Development Strategy (No.3)	Geelong Regional Commission
	Human Services Initiatives for the Region (No.4)	Geelong Regional Commission

The above documentation is held by the Victorian Government Offices Library, 5th Floor, State Government Offices, Little Malop Street, Geelong. Access can be obtained by contacting the Librarian. Further information can be obtained from the Geelong Regional Commission, on (052) 264852.

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