

About this discussion paper

This discussion paper has been prepared as part of the Skilling the Bay project. Skilling the Bay is a three year (2012-14), \$1.3 million project funded by the State Government. The Skilling the Bay project is being led by The Gordon and delivered in partnership with Deakin University and the State Government. The project is designed to grow existing and emerging industries by linking future job creation to skill development in the Geelong region.

The creation of a long term jobs vision for Geelong and agreeing actions to support the region to transition is a key objective of the project. This discussion paper is an important resource to inform debate about the next steps at the upcoming Geelong Jobs Forum.

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1 Executive summary

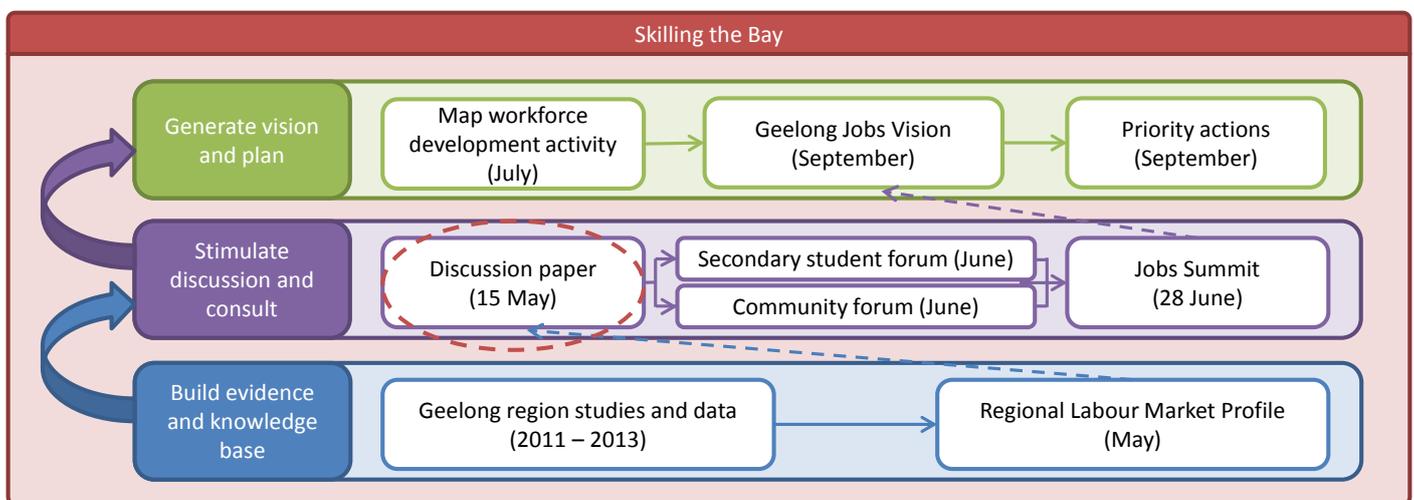
The Skilling the Bay project is designed to help Geelong deliver success to its economy for the benefit of the entire community.

The region faces a series of challenges. The manufacturing sector is embedded in the economy and some industries within the sector are under continued pressure. While Geelong and its people have been resilient with growth in employment and the economy becoming more diverse, there remain some areas of vulnerability where the growth experienced has been insufficient to sustain wealth and jobs growth. Geelong’s future success will come from jobs growth and wealth creation. Geelong can deliver this by fast tracking its shift to a high-skilled and knowledge centric economy built on its unique current and emerging regional strengths. Geelong has attractive lifestyle opportunities, a diverse and growing services sector, strong education assets and strategic proximity to Melbourne and the Surf Coast. These are different advantages to what has delivered Geelong success in the past. Geelong can leverage these strengths to enhance manufacturing capabilities into new growth areas, attract and develop emerging industries and ensure there are exciting job opportunities for the next generation.

A series of practical action plans to diversify the economy and generate new employment opportunities can be the catalyst for Geelong’s success. The vision will be owned by Geelong’s citizens and be underpinned by a set of actions that ensure a long term view with the benefits to flow through the community as well as the economy.

Figure 1 outlines the wider process and indicates the role of this discussion paper within the broader project.

Figure 1: The process for the Skilling the Bay project



2 Securing the future

Geelong’s future economic success depends on a high growth model supported by the development of higher skills, specialisation and expertise within the community. Geelong needs to identify what a high growth model for new investment and employment opportunities could look like. This vision can be underpinned by values that ensure the benefits of the high growth model are owned by Geelong citizens. A draft set of the values is outlined in Figure 2.

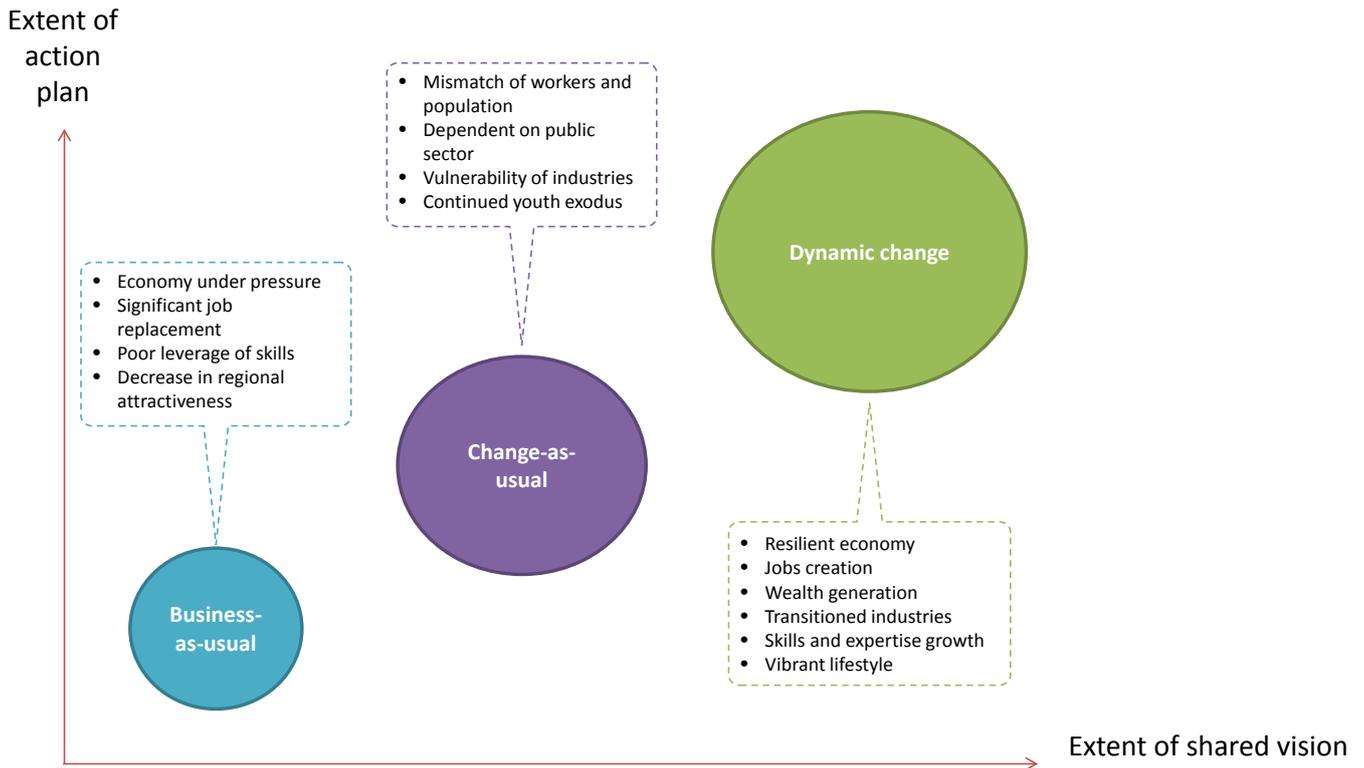
Figure 2: Draft values for Geelong’s Jobs Vision



While Geelong and its economy are under pressure, the region’s resilience is a source of great strength. The consequences of recent announcements at Shell and Ford are still being felt by the community and local businesses, and are expected to continue for some time. Despite the challenges to its traditional industry base over recent years, Geelong’s economy grew on average by 2.86% per annum over 2001 to 2011 (Regional Development Victoria, Geelong Economic Profile, 2013, unpublished).

However, Geelong’s traditional strengths continue to be challenged. If Geelong’s leaders look to the longer-term, they will recognise that the case for action is compelling. Figure 3 outlines three scenarios for Geelong’s future.

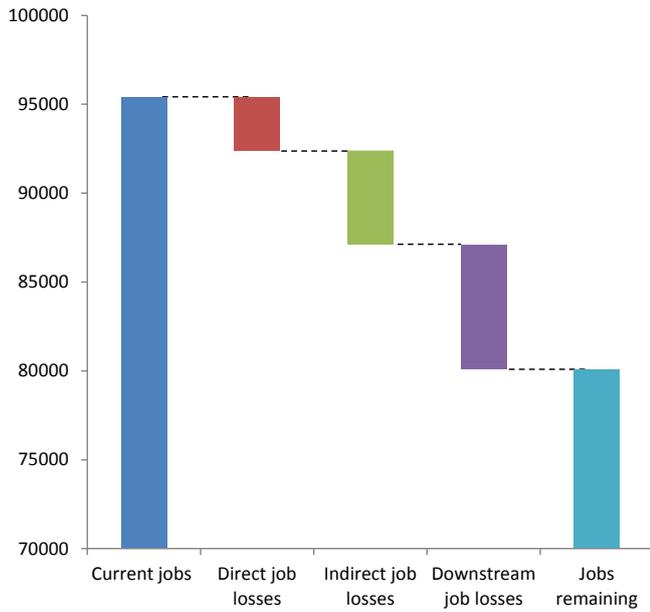
Figure 3: Plausible future scenarios and their impact on Geelong



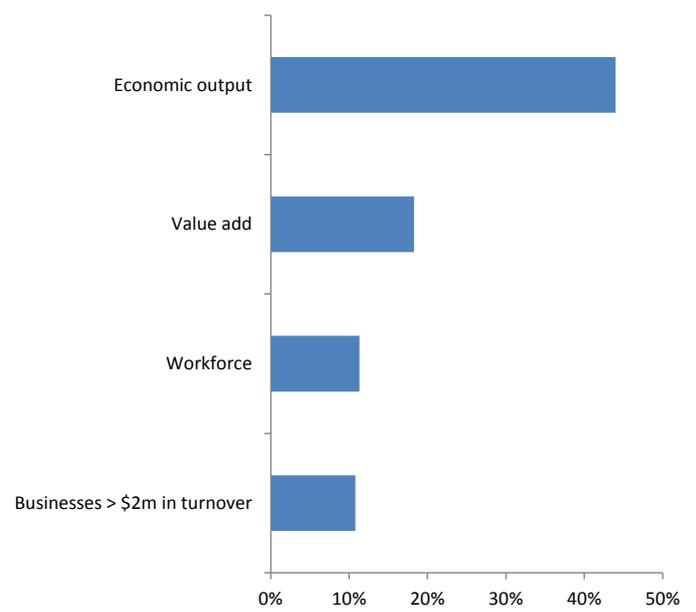
This emphasises the importance of generating new opportunities for investment and employment in the community in order to avoid the consequences of a mismatch in jobs and population growth. Geelong is expecting a 36% surge in population to more than 300,000 within 20 years (Victoria in Future 2012, April 2012, Dpt. of Planning & Community Development). On current trajectories, job opportunities are unable to match this growth with some of the largest manufacturing employers downsizing and closing operations (see Figure 4 – Left) and the consequential impact on small and medium enterprises (SME) through the supply chain. This is compounded by an ageing workforce with limited replacement, an economy that is heavily leveraged towards vulnerable elements of the manufacturing sector (see Figure 4 – Right), and a services sector that has grown to 85% of the workforce (RMIT University, Geelong Regional Labour Market Profile, 2013) and been unmatched by growth in wealth generating jobs.

Figure 4: Expected manufacturing job losses and the sector’s importance to Geelong. The need for, and value of, manufacturing in Geelong is explored in detail in section 5.

Number of Jobs, Geelong, 2013



Manufacturing within Geelong, 2012



Source: REMPLAN, 2012; Economic Indicators – Geelong: Open For Business, City of Greater Geelong, 2012.

To secure future success for the regional economy, the community and key stakeholders in Geelong need to identify where action is required to generate growth, and assist leaders to focus on future rather than intermediate issues. A strategic and actionable vision will bring wealth and exciting job opportunities for residents and a more attractive regional lifestyle. Importantly, it will deliver resilience in the face of change - which is a real likelihood in the short term.

Questions for discussion

1. Are these the right values to underpin Geelong's jobs vision and priority actions?
2. Are there any that could be added? What are they?
3. What level of transformation should Geelong commit to from the current state: Business-as-usual; change-as-usual; or breakthrough change?
4. What will Geelong do to transition workers from declining industries to new employment opportunities?

3 Success will come through job and wealth creation

3.1 Regional strength comes from the right balance throughout the economy

Success is a regional economy with a mix of traditional and new industries that can effectively respond to change. This will create a diverse dynamic economy. It is clear from recent history that Geelong must create the capacity for change and generate wealth and jobs on the back of its strengths and established sectors – manufacturing and services. A successful economy relies on more than one sector for job creation and wealth generation and has a balance between strong public and private employers. There are many regional advantages that can enable Geelong to create a world-class regional economy. It has leading research and development capability, a strong education and training sector, attractive lifestyle features, transport connectivity and strategic proximity to large, diverse markets.

Opportunity for success

Building on our strengths: Geelong automotive industry

Geelong's automotive industry has been under pressure with increasing international competition and rising input costs. This potential challenge can be transformed into a positive. Geelong could use its deep manufacturing expertise to support the growth needs of burgeoning automotive manufacturing players internationally. Using existing strengths and selling what industries already have to international markets can protect major supply chains and bring wealth and jobs to Geelong. These benefits can come without the consequences of change.

3.2 Leadership will connect people to results

Leadership and good management are the critical connectors between the creation of opportunities and the people who will deliver success. Good management is the most cost-effective way to make an economy more productive (Management Matters, 2007, p. 10). A focus on the formal provision of training and education is not enough. Leadership will enable increasingly well-educated citizens to use their skills in the workplace: it will turn potential change in performance into a tangible increase in productivity. Leadership is the cornerstone of proactive and successful change. A clear focus on the identification and utilisation of leaders is critical to make a successful vision and plan for Geelong a reality.

Questions for discussion

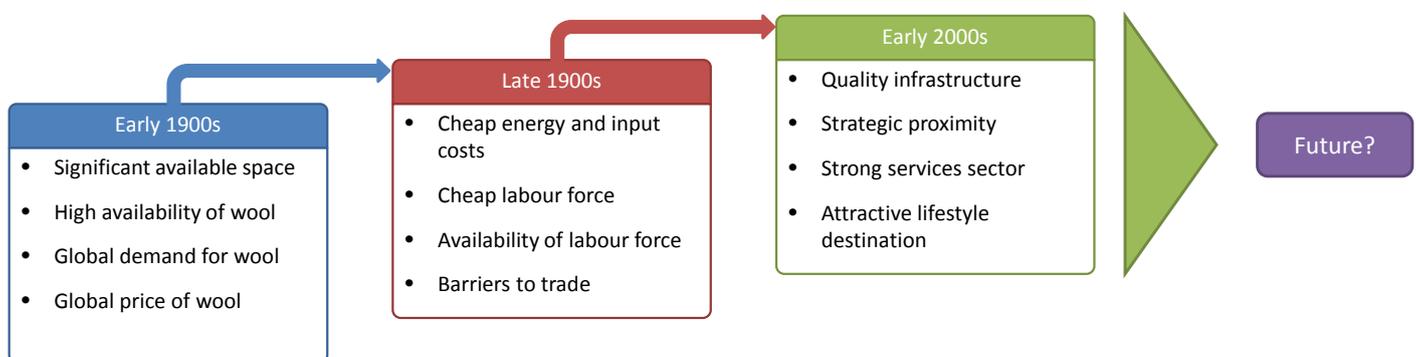
5. *What is the right mix of jobs in the public and private sector? What can be done to improve the balance?*
6. *Does Geelong have world class leadership and management and make the best decisions with its resources and investments? What can be done to strengthen this?*

4 Geelong must constantly renew its competitive strengths

4.1 The basis of Geelong’s advantages should move from cost to quality

Historically, Geelong’s success has been built on its unique competitive strengths - the future will be no different. These are its differentiators and have enabled it to generate wealth and jobs on a world scale. However, strengths are not static and are continually subject to decline and change. Ongoing success hinges on a regional economy’s ability to develop and renew its strengths in anticipation of change. For Geelong, that time is now. Figure 5 outlines the transition of Geelong’s regional strengths over the past 100 years and highlights the extent to which the basis of success can transform over a short period.

Figure 5: The evolution of Geelong’s regional advantages



Evidence points to the requirement to shift from a cost to a quality advantage. The conditions for Geelong’s strong trading history have shifted. The Australian Dollar’s high exchange rate is expected to remain, energy costs continue to rise, the local labour market cannot compete for price with developing international markets and international market access remains a challenge. Geelong’s future depends on high quality products and services. The future for Geelong is a shift to a highly skilled, innovative, knowledge-based economy with strategic pockets of expertise. This transition is consistent with that of leading economies across Australia and beyond. It will bring high quality products and services that Geelong can trade with the world.

Opportunity for success

Building a diverse economy: Hamilton, Ontario, Canada

Hamilton, Ontario was a strong manufacturing centre that was faced with increasing competition and an expected 55% of its manufacturing workforce to retire in the medium term. Targeted investment in its education and health sectors and a proactive transformation to a high-tech and knowledge centric economy provided a diverse and resilient regional centre. This early and strategic action protected those vulnerable to change and set Hamilton’s economy, job market and citizens up for success.

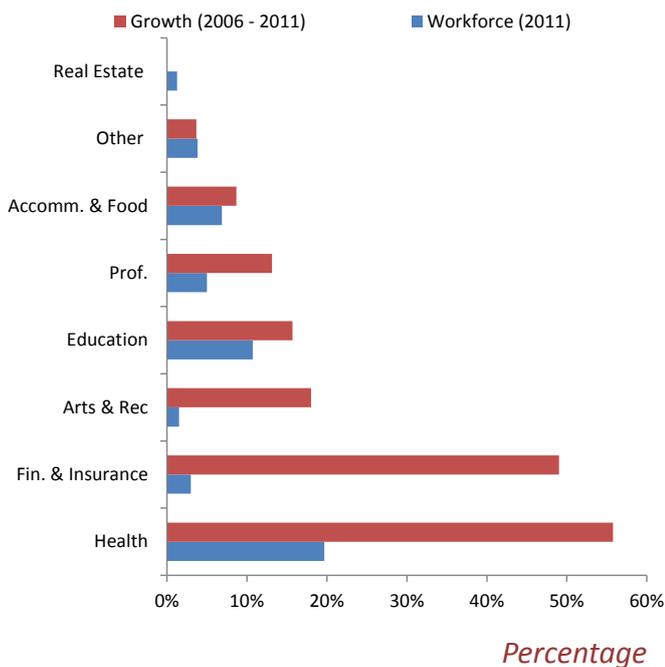
4.2 The service-based economy will continue to grow

The strength of Geelong’s service sector is a hallmark of a vibrant economy and a pillar of its success. From this, local businesses grow while the community benefits from strong education, health and lifestyle support. A strong services sector is critical to attract skilled people and expertise to the region and secure the business and trade that follows. It will continue to be embedded in the economy and expand as the biggest employing sector.

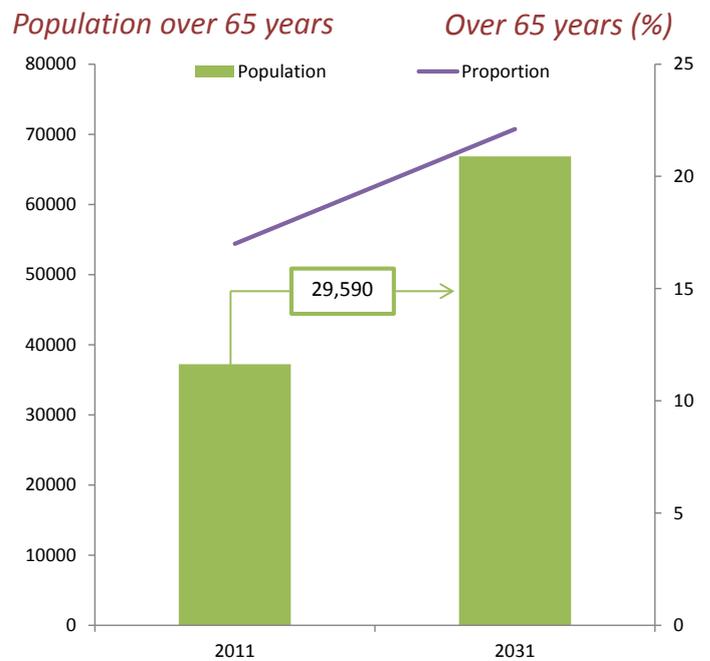
The shift to a service based economy has arisen while manufacturing has been under continued pressure. This has led to jobs growth despite a net loss of jobs in manufacturing. Service based sectors are important pillars of Geelong’s liveability and attractiveness. Figure 6 -Left shows that service sectors have been the biggest provider of new jobs across Geelong and are the growth sectors for employment.

The service sector is expected to continue to grow and remain a major employing sector. Services will continue to be in demand as Geelong’s population ages at a fast rate and increases considerably (Figure 6 – Right). In addition, Geelong can be a base from which to provide services in the (i) Health Care and Social Assistance and (ii) Education and Training sectors to fast growing Wyndham, where large growth in employment in these areas is predicted (Juturna Pty Ltd, 2013, unpublished).

Figure 6: The rise of the service sector and Geelong’s ageing population



Source: Economic Indicators – Geelong: Open For Business, City of Greater Geelong, 2012.



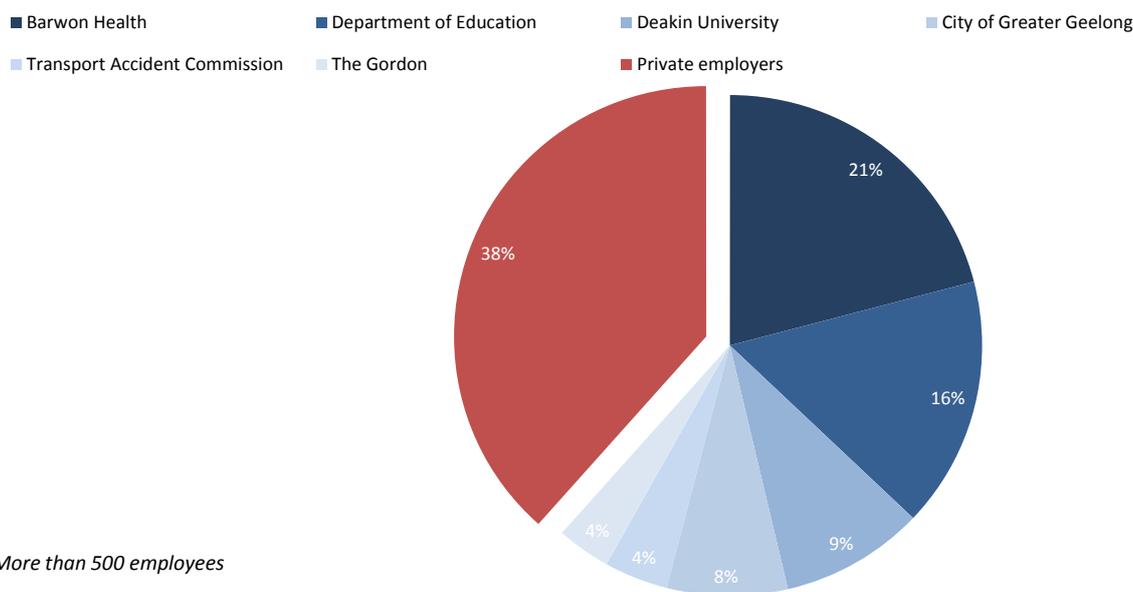
Source: Victoria in Future 2012, Department of Planning and Community Development, April 2012.

4.3 Geelong must create the capacity for growth industries

It is time for Geelong to proactively develop and sustain strong new industries that are able to trade beyond the boundaries of the region. To achieve this will require infrastructure that is aligned to support this growth, and an understanding that manufacturing is embedded in the economy and community and cannot be ignored. The service sector cannot be the economic base of the area. It is inherently vulnerable with its reliance on government funding and lack of external selling power. Figure 7 shows that Geelong’s biggest employers largely operate on government funding. Looking across all employers in Geelong this group represents approximately 15% of its workforce (Economic Indicators – Geelong Open For Business, City of Greater Geelong, 2012).

Figure 7: Proportion of employees at Geelong’s biggest employers

Proportion of Geelong’s major employers*, 2013



*More than 500 employees

Source: Economic Indicators – Geelong: Open For Business, City of Greater Geelong, 2012.

A platform to develop, attract and grow new and emerging high quality industries will reinforce the knowledge based economy and bring wealth and jobs. These industries will emerge and flourish if based on Geelong’s unique regional strengths. High skilled workers look beyond commercial opportunities and are attracted to lifestyle and living features, which Geelong can continue to enhance. Table 1 outlines a non-exhaustive list of growth opportunities based on Geelong’s strengths and emerging employment and industry profiles.

Table 1: Growth industries available to Geelong

| Industry opportunity | Regional strengths |
|--|---|
| Industries for transition | |
| Clean-tech and advanced manufacturing | <ul style="list-style-type: none"> • Strong manufacturing and skills base • Natural transition from heavy manufacturing • A global growth industry • Capability supply through Deakin University • Existing trend in this direction |
| Food manufacturing | <ul style="list-style-type: none"> • Supply chains with agricultural suppliers • Strong manufacturing skills, equipment and plant base • Existing workforce and strong industry sub-sector • Port and air linkages to Asian markets • A global growth industry |
| Industries to further enhance | |
| Transport and logistics | <ul style="list-style-type: none"> • Existing infrastructure assets (Avalon Airport, rail links, port, freeway) • A regional hub • Proximity to Melbourne and the South-West |
| Construction | <ul style="list-style-type: none"> • Existing skills and capabilities • A growth area • Demand for housing with population growth • Proximity to Melbourne’s Western growth area |
| Education (international student market) | <ul style="list-style-type: none"> • World class education assets • Attractive lifestyle destination • Low cost student living • Proximity to Melbourne |
| Industries to develop and attract | |
| Advanced materials design | <ul style="list-style-type: none"> • Research strength of Deakin University • Collaboration opportunities • Emerging regional strength in carbon fibre |
| Fashion and retail | <ul style="list-style-type: none"> • An existing industry presence • Cost advantages |

| Industry opportunity | Regional strengths |
|----------------------------------|---|
| Health technology and innovation | <ul style="list-style-type: none"> • Fragmented yet deep capabilities • Leveraging off the strong services sector • International growth area • Collaboration opportunities (Barwon Health, Epworth, Deakin University, CSIRO, Bio-Geelong) |

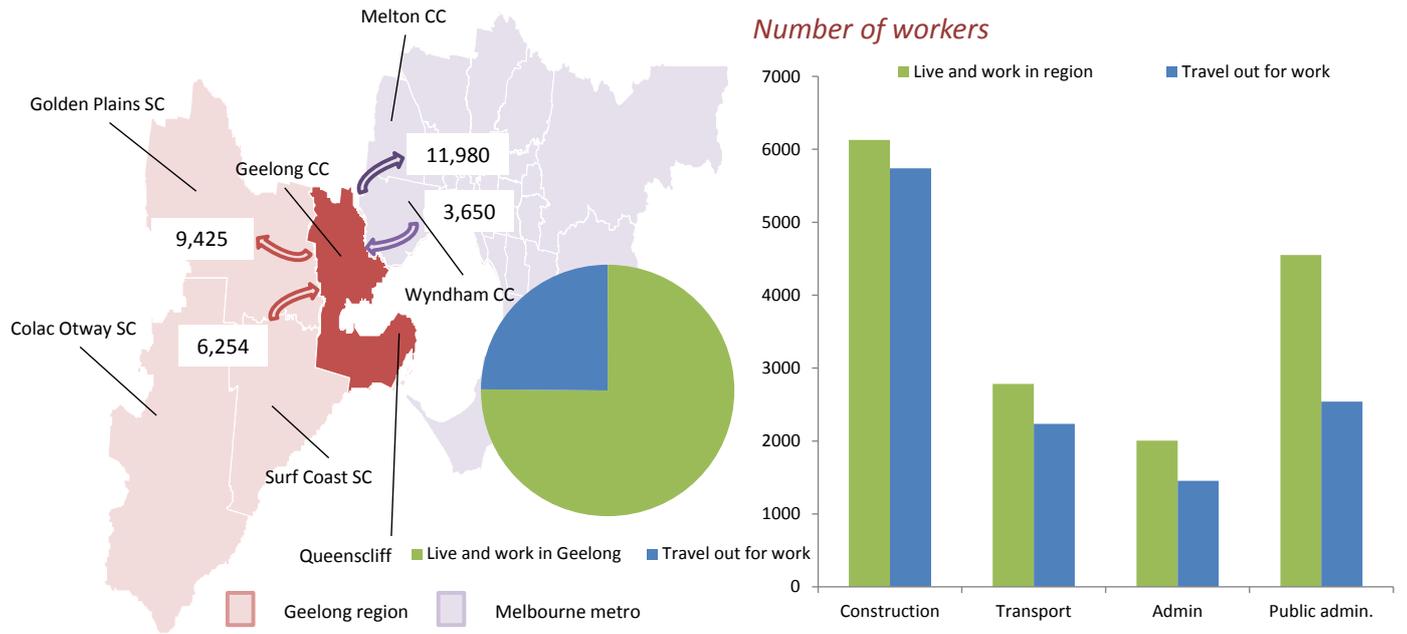
Transport and logistics infrastructure is essential to facilitate growth industries. Geelong has rare transport and infrastructure assets which are a regional strength, although it will need to upgrade and invest to fully realise its potential. Importantly, the Geelong Port, Avalon Airport and rail links are impressive assets that with the right upgrades can better connect Geelong internally and to the world. Additionally, intra-regional public transport is under pressure and is important to connect a growing population with work, education and lifestyle opportunities.

4.4 Geelong’s neighbours represent a critical market

Geelong has strategic proximity to metropolitan, regional and rural centres which offer strong market opportunities when it is considered as part of a broader economic region. Geelong can look to take advantage of these as it carefully develops and renews its regional strengths. While Geelong cannot be ‘all things to all people’, it can integrate the strengths of its neighbours to develop an open regional market that is more than the sum of its parts.

Geelong has the rare ability to build a regionally integrated and connected labour market where it can import skills and expertise for industry development and wealth to circulate through the community. Figure 8 indicates Geelong’s connectedness, employment mobility and its self-containment, both with metropolitan Melbourne and the wider Barwon South-West region. A large proportion of Geelong’s workforce lives and works in the city while a considerable number from certain sectors are dependent on its regional and metropolitan neighbours for work opportunities. In addition, many workers from outside Geelong commute in for work. Geelong has the capacity to be both a thriving metropolitan centre and a regional powerhouse at the same time. Its focus can be twofold: to continue to strengthen the self-containment of portions of its labour market (people who live and work locally); and to integrate with its neighbours who offer extensive work opportunities and skills and labour to import. Geelong’s key strengths are its regional connectedness, proximity to Melbourne and the Surf Coast and diversity. It will benefit if it continues to enhance and build upon these.

Figure 8: The connectedness and self-containment of Geelong's labour market



Source: Geelong Regional Labour Market Profile, RMIT University, 2013.; Draft G21 Economic Development Strategy Background Paper, AEC Group, 2013.

Questions for discussion

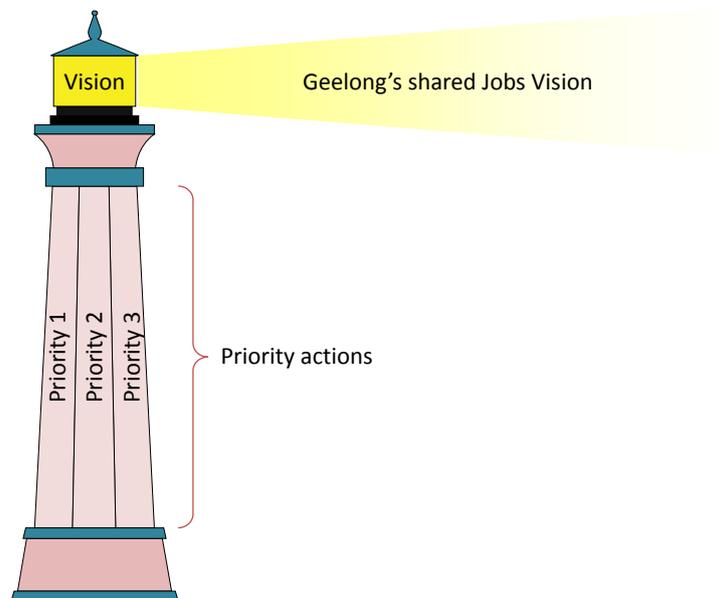
7. *What are the three regional strengths that Geelong's future success can be built on?*
8. *How can Geelong leverage off its strong services sector to generate more wealth and jobs?*
9. *What new industries should Geelong develop and attract?*
10. *What activities are priorities to attract these industries?*
11. *What infrastructure upgrades are highest priority to facilitate the industry growth sought?*
12. *How can Geelong leverage off its neighbours to generate jobs and wealth?*

5 An action plan is a catalyst for a high-skilled, high-growth regional economy

5.1 Strategic actions can deliver the jobs vision

Geelong's shared vision is the first step in securing the future of work in Geelong, although it will not deliver change on its own. The goal is to set strategic priorities that are able to realise that vision and ensure it is accompanied by a path of action. Figure 9 outlines the model used to deliver the Jobs Vision, which includes a small number of strategic actions. These priorities will incorporate workforce development features which may include: jobs strategies for critical industry sectors; skills and industry transition; investment attraction; industry development; community and lifestyle enhancement; transport connectedness; alleviation of disadvantage; skills and expertise growth; research and development commercialisation; regional collaboration; leadership and management enhancement; investing in youth; and hiring local.

Figure 9: Geelong's Jobs Vision and Priority Actions

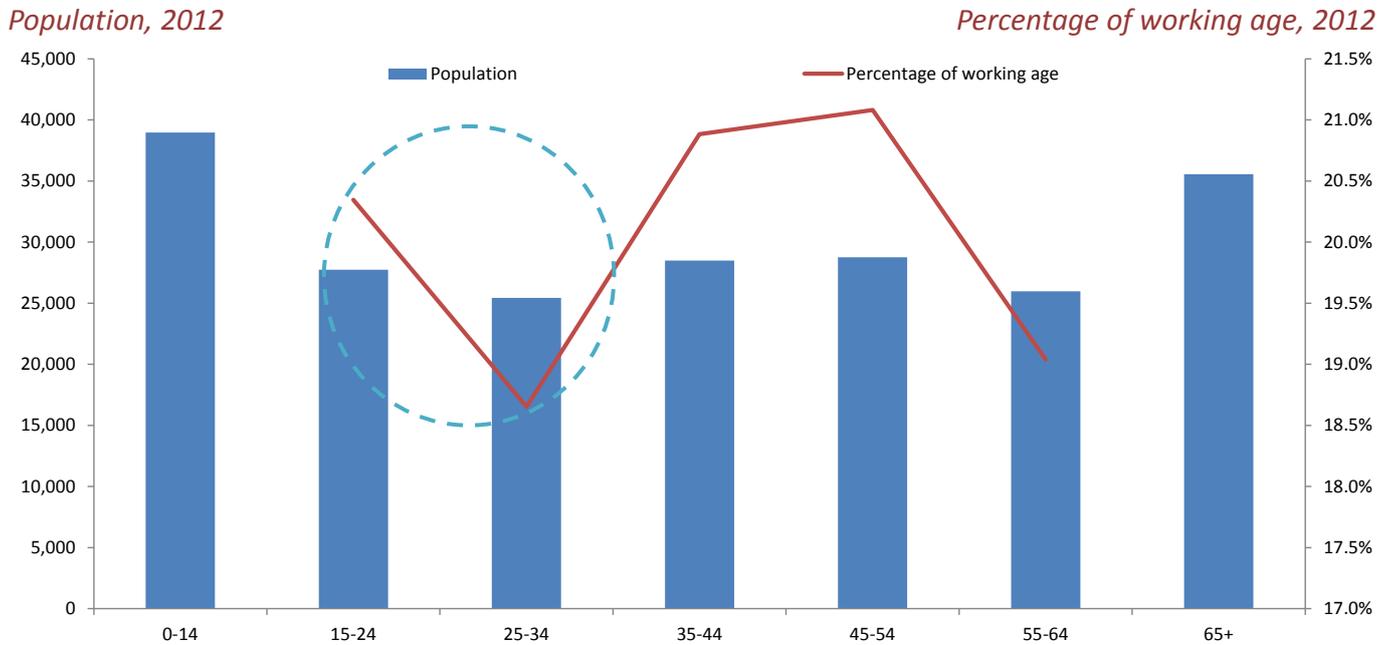


5.2 The actions should focus on a healthy and flexible talent pool

To have a dynamic and diverse economy it must be underpinned by a workforce profile of people available to do the work. To move to a knowledge-centric and innovative economy based on quality requires a healthy quantity of the right blend of specialisation in the right areas led by pockets of expertise. This will create a flexible workforce that can adapt to change, a healthy talent pool with the ability to create jobs and wealth and expertise for industry investment attractiveness.

Ongoing workforce development and renewal naturally follows when the right talent pool is in place. This dynamic workforce will be an enabler of the economy’s capacity for change – they will make things happen. With an ageing workforce, a shortage of young replacements (Figure 10), it is critical to the region that the workforce’s specialisation, quantity and quality is developed and renewed. Key to this is to create conditions that maintain Geelong as an attractive life, study and work destination. The benefits of this are two-fold: to prevent young people from continuing to seek opportunities elsewhere; and to attract further high skilled workers to the area.

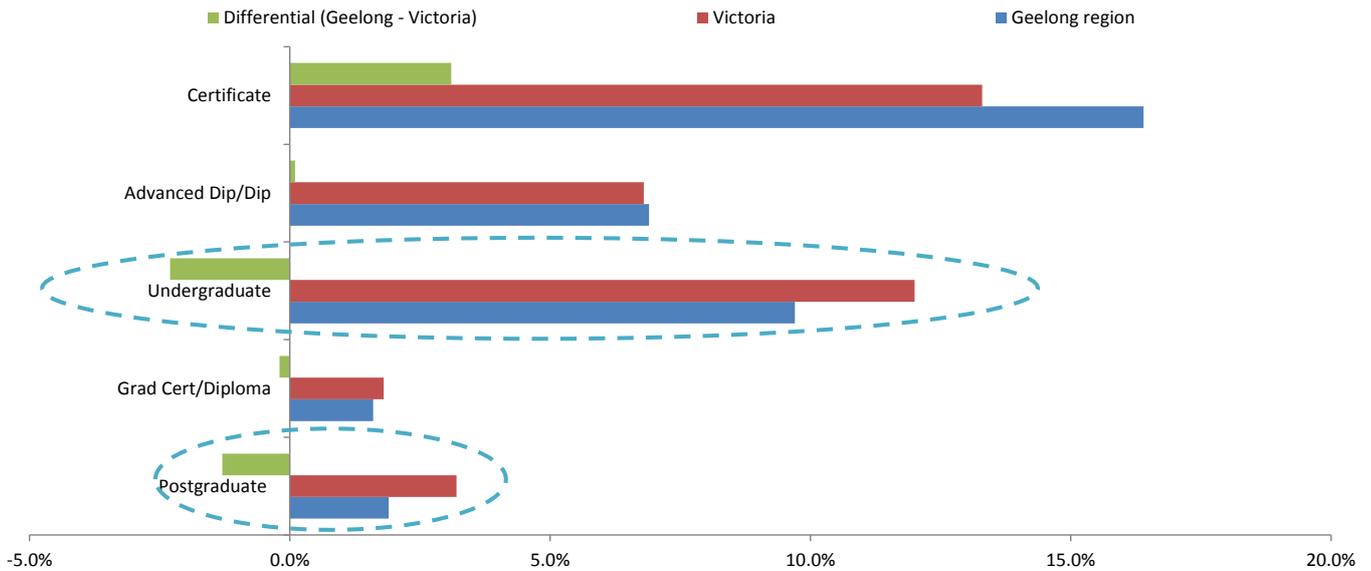
Figure 10: The Geelong region’s ageing workforce



Source: Geelong Regional Labour Market Profile, RMIT University, 2013.

Geelong will also need pockets of expertise to attract and develop new industries. Highly specialised, trained and experienced industry leaders are needed to provide the capability for new industries to emerge, businesses to be drawn to the region and to break new ground. Figure 11 highlights the education specialisation gap of the region, with low levels of higher education attainment compared to Victoria. This is despite the world class education institutions that exist. It is critical to address this to generate hubs of expertise that will attract and develop new industries.

Figure 11: Attainment rates in the Geelong region



Percentage of population, 2012

Source: Geelong Regional Labour Market Profile, RMIT University, 2013.

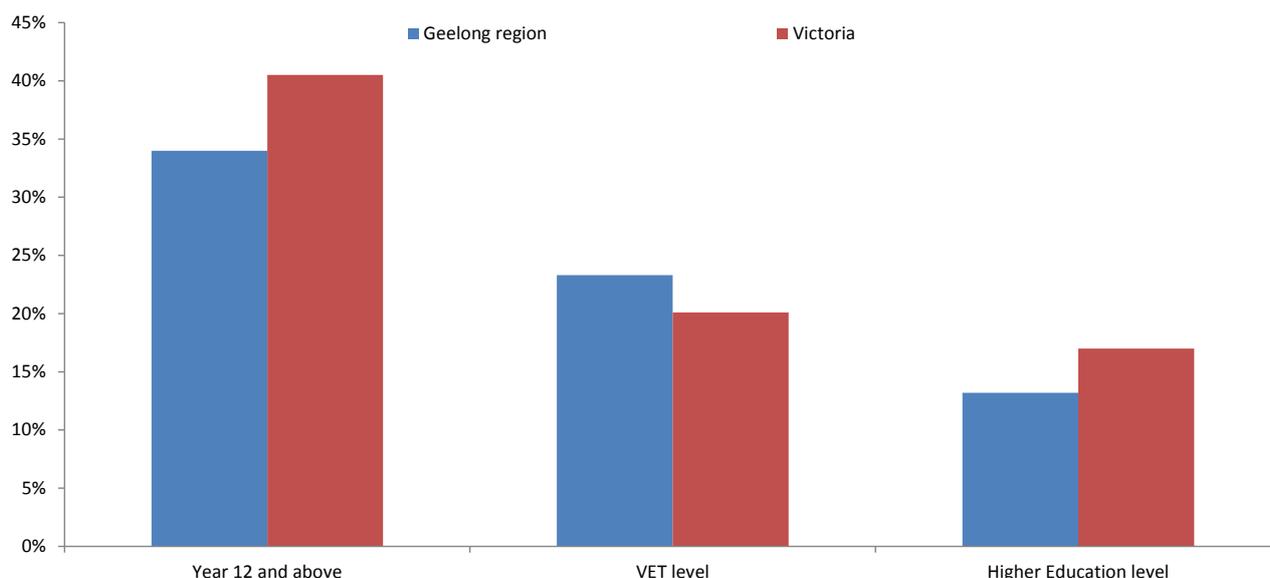
5.3 Education and training is a key ingredient

The education and training sector has a major role to play in Geelong’s future. This is beyond education being a large employing sector. Geelong has world-class education assets with broad course and program offerings, and research and development potential that is yet to be fully realised. Indeed, this is rare for a regional centre. To develop and renew the workforce and create conditions for high growth industries there are priority areas for the sector’s attention.

Education providers are positioned to take the lead to develop and renew the workforce and be a driver of Geelong’s move to a knowledge-based, high quality economy. This will be led by higher utilisation of education assets, improvement in higher education attainment rates and skills building and transition of retrenched workers. Figure 12 outlines that Geelong’s education levels are below the Victorian benchmark for high school and bachelor degrees. This also highlights the region’s vocational focus.

Figure 12: Geelong’s education issues

Percentage of population, 2012



Source: *Regional Labour Market Profile, RMIT University, 2013; Economic Indicators – Geelong: Open For Business, City of Greater Geelong, 2012.*

The education sector has the ability to further leverage its research and development capability for the benefit of local businesses and the Geelong economy. Deakin University has a leading edge technology precinct (which includes frontier materials, intelligent systems, biotechnology and inter-disciplinary sciences and molecular and medical research) and is genuinely committed to its research and development capability in the Geelong area. There are significant opportunities to realise the full commercial benefits of this capability: for local businesses, for investment attraction and to generate new growth industries.

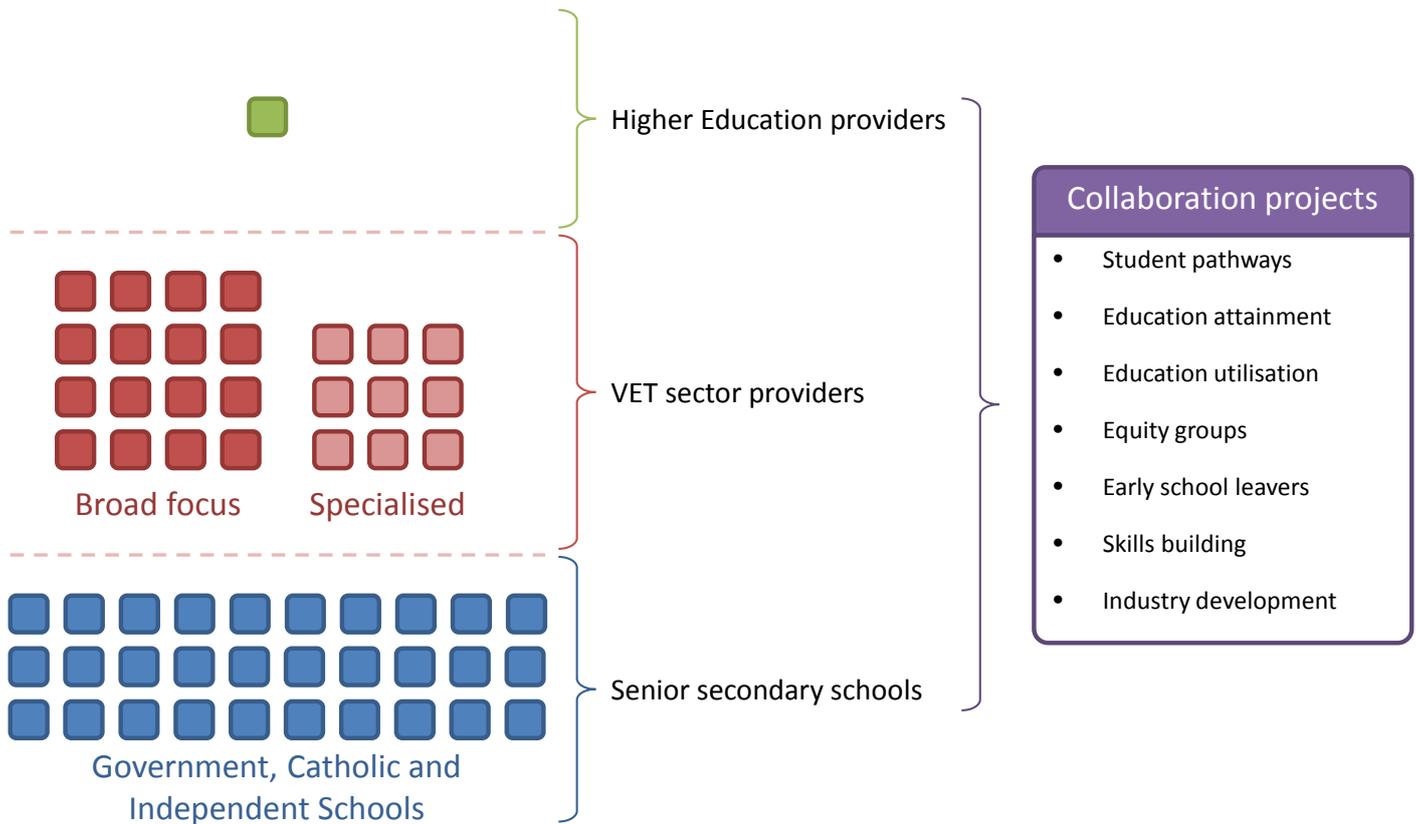
5.4 Education and training to match the economy’s capacity for change

The education sector should both drive and adapt to the demands of the economy and its labour market. This will flow from each provider being responsive, as well as closely linked, to create a collaborative education sector across school, vocational education and training and higher education.

Individual education sector providers should be equally committed to dynamic business models. If they are proactive in their activities they will anticipate the needs of the labour market and respond as required and be accessible to the full spectrum of Geelong’s communities. The focus of their responsibility and responsiveness is three-fold: to fill skills shortages and skills gaps; to create the capabilities for new growth industries; and to transition workers to new employment opportunities.

Geelong should look to strengthen the connectedness of its education sector across senior secondary, vocational education and training and higher education to create a mixed sector that supports study and work pathways. Figure 13 shows that there is a wealth of secondary schools and training providers across the region which creates significant opportunities for collaborations and joint projects.

Figure 13: The education sector landscape in the Geelong region



A focus for the education sector is to improve workforce participation through study pathways that prepare both employed and unemployed citizens for the workplace. The benefits from this are enormous and include improved productivity, a more engaged and vibrant community, and will support youth to stay in Geelong. This can be achieved through support at high school for collaborations that deliver training to early school leavers. The proportion of Geelong region's citizens who have achieved year 12 level is 6% below the Victorian benchmark (Geelong Regional Labour Market Profile, 2013). This offers a potential resource of workers that the education sector can transition into the workforce through training and study pathways, provided these people are available and accessible. It also provides an opportunity to build a stronger regional community.

Questions for discussion

13. *What and how many strategic priorities should accompany the Geelong jobs vision?*
14. *How does Geelong drive collaboration around workforce development?*
15. *In what industries does Geelong need to develop or attract expertise?*
16. *What is required to prevent young workers from looking for opportunities elsewhere?*
17. *What can be done to improve the attainment rates in Geelong?*
18. *How can education be more accessible to pockets of disadvantage?*
19. *What collaborations are needed to attract investment and generate commercial outcomes from Deakin's research and development centres?*
20. *How can Geelong's education sector more adequately fill skills gaps and shortages?*
21. *What are the activities of Geelong's education sector to make its population more attractive to employers?*
22. *Does Geelong require a more diverse education sector?*
23. *What collaboration projects can the education sector focus on to improve the education levels in the area?*

Appendix A Questions for discussion

The following discussion questions are intended to stimulate discussion about the issues examined in the discussion paper.

Table 2: Questions in this discussion paper

| Section of paper | Question |
|------------------|---|
| 2 | <ul style="list-style-type: none"> ◦ Are these the right values to underpin Geelong’s Jobs Vision and Priority Actions? ◦ Are there any that could be added? What are they? ◦ What level of transformation should Geelong commit to from the current state: Business-as-usual; change-as-usual; or breakthrough change? ◦ What will Geelong do to transition workers from declining industries to new employment opportunities? |
| 3.1 | <ul style="list-style-type: none"> ◦ What is the right mix of jobs in the public and private sector? What can be done to improve the balance? |
| 3.2 | <ul style="list-style-type: none"> ◦ Does Geelong have world class leadership and management and make the best decisions with its resources and investments? What can be done to strengthen this? |
| 4.1 | <ul style="list-style-type: none"> ◦ What are the three regional strengths that Geelong’s future success can be built on? |
| 4.2 | <ul style="list-style-type: none"> ◦ How can Geelong leverage off its strong services sector to generate more wealth and jobs? |
| 4.3 | <ul style="list-style-type: none"> ◦ What new industries should Geelong develop and attract? ◦ What activities are priorities to attract these industries? ◦ What infrastructure upgrades are highest priority to facilitate the industry growth sought? |
| 4.4 | <ul style="list-style-type: none"> ◦ How can Geelong leverage off its neighbours to generate jobs and wealth? |
| 5.1 | <ul style="list-style-type: none"> ◦ What and how many strategic priorities should accompany the Geelong Jobs Vision? ◦ How does Geelong drive collaboration around workforce development? |
| 5.2 | <ul style="list-style-type: none"> ◦ In what industries does Geelong need to develop or attract expertise? ◦ What is required to prevent young workers from looking for opportunities elsewhere? |
| 5.3 | <ul style="list-style-type: none"> ◦ What can be done to improve the attainment rates in Geelong? ◦ How can education be more accessible to pockets of disadvantage? ◦ What collaborations are needed to attract investment and generate commercial outcomes from Deakin’s research and development centres? |

| Section of paper | Question |
|------------------|--|
| 5.4 | <ul style="list-style-type: none">• How can Geelong’s education sector more adequately fill skills gaps and shortages?• What are the activities of Geelong’s education sector to make its population more attractive to employers?• Does Geelong require a more diverse education sector?• What collaboration projects can the education sector focus on to improve the education levels in the area? |

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