

GEDC - GOLDFIELDS ESPERANCE DEVELOPMENT COMMISSION

Competition Policy Branch
Productivity Commission
Canberra Office
PO Box 80
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Dear Sir

**RE: GOLDFIELDS ESPERANCE DEVELOPMENT COMMISSION
SUBMISSION TO PRODUCTIVITY COMMISSION INQUIRY INTO THE
IMPACT OF COMPETITION POLICY REFORMS ON RURAL AND
REGIONAL AUSTRALIA**

Enclosed with this letter is a copy of the GEDC submission to the Productivity Commission inquiry into the Impact of Competition Policy Reforms on Rural and Regional Australia.

The GEDC is the State Government organisation responsible for the promotion of economic and social development of the Goldfields-Esperance region in Western Australia. This region is over 771,276kni2 in size with a population near 60,000 people. It contributes in excess of \$3 billion annually to the state's economy through industries in mining, agriculture, manufacturing and tourism. The vast majority of this income is obtained from mining (approximately 80%).

The submission to the Commission, *Impact of the National Competition Policy on the Goldfields-Esperance Region*, follows reports done on the National Competition Policy by the Regional Development Council of WA.

The GEDC Report summarises the current situation of the major infrastructure and service markets in the region and the impact that the National Competition Policy has had or is likely to have on them.

I urge the Commission to consider carefully the issues raised in this paper and the impact that the NCP will have on one of Australia's major wealth producing regions.

Yours sincerely

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GEDC - GOLDFIELDS ESPERANCE DEVELOPMENT COMMISSION

Impact of the National Competition Policy on the
Gold fields-Esperance Region

Submission to the Productivity Commission Inquiry into the Impact of
Competition Policy Reforms on Rural and Regional Australia

22 June 1999

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Summary

This paper is a brief examination by the Goldfields-Esperance Development Commission (GEDC) of the impact of National Competition Policy in the Goldfields-Esperance region. The region includes the City of Kalgoorlie- Boulder, and the Shires of Coolgardie, Dundas, Esperance, Laverton, Leonora, Menzies, Ngaanyatjaraku and Ravensthorpe.

The GEDC is a State Government organisation responsible for the promotion of economic and social development of the Goldfields-Esperance region in Western Australia. This region is about 771,276km² in size, hosts a population of nearly 60,000 people, and contributes in excess of \$33 billion annually to the state's economy through industries in mining, agriculture, manufacturing and tourism.

The major National Competition Policy issues for the Goldfields-Esperance region are:

- * The region, while one of the State's major wealth producers, is one of the poorest in terms of infrastructure and services;
- * The dependence of the region on resource projects to create the demand for infrastructure upgrades.,^{c1}
- * The region's isolation and sparse population is its major problem in creating a competitive market;
- * Some infrastructure and service markets are unlikely to be ever opened to a competitive market; and
- * The region requires strong, Community Service Obligations and access regimes' for infrastructure and service needs to be met.

The GEDC believes that the National Competition Policy has the potential for impact on the economic and social development in the region. However, it is unlikely that the region will see major benefits from the policy due to its isolation and population.

GOLDFIELDS-ESPERANCE DEVELOPMENT COMMISSION

Economic Statistics of the Goldfields-Esperance Region

AREA 771,276.1 km²

The region represents about a quarter of the state from the south coast north to the Tropic of Capricorn and east-west from Coolgardie to Eucla, the WA/SA border.

POPULATION	Estimated residential population 1998	58,391
ABS Census 1996	Regional Total	57,498
Population Density		0.1 person/km ²
Male		31,812
Female		25,686
Over 65 years		2,261
% projected population growth 2001 to 2022		1.16%
Average Annual Growth Rate 1993-98		1.9%
Population projection to 2011		65,600

SHIRES	(9 in the region) Estimated residential population 1998	
Coolgardie		5,332
Dundas		1,567
Esperance		12,831
Kalgoorlie-Boulder		31,191
Laverton		1,208
Leonora		2,712
Menzies		343
Ngaanyatjarraku		1,553
Ravensthorpe		1,454

MINING	Revenue in 1997/98	
Gold		\$3.0b
Black Granite		\$2.2b
Construction material		\$0.3m
Gypsum		\$2.2m
Limestone/Dolomite		\$0.2m
Nickel		\$1.5m
Cobalt		\$814.0m
Concentrates		\$81.7m
Paladium		\$722.2m
Platinum		\$6.7m
Silica Sand		\$3.1m
Salt		\$0.4m
		\$0.5m

NO. OF RURAL HOLDINGS 1996 739

AREA OF RURAL HOLDINGS 1996 1 7.5m hectares

AGRICULTURE 1996	Total Value	\$255.4m
Wool		\$61.5m
Cereals for grain crops		\$131.7m
Livestock slaughtered		\$44.0m
Wheat 1996		\$70.5m
Barley 1996		\$59.0m
Canola 1996		\$47.7m

GOLDFIELDS-ESPERANCE ECONOMY - 1996/97

Gross Regional Product	\$3.2b
Share of WA Gross Domestic Product	5.13% State GDP

RETAIL TURNOVER	1997			\$417m
MANUFACTURING	1994	82 locations	Turnover	\$437m
CONSTRUCTION	1996/97			\$122m

BUILDING	1996/97 Total approvals	\$121m
	State	4.2%
	Av. Dwelling approved	\$101,615.00
	Non-residential	\$60.6m
TOURISM	1996 expenditure	\$109.3m
	No. of visitors	564,000
	Portion of state tourism	6.3%

FISHING	1996	2,374 Tonnes	\$10.1m
FORESTRY	1996/97	2,000 tonnes Sandalwood	\$7.5m
		2,070 tonnes native hardwood	\$20,000

EMPLOYMENT	Estimated labour force at 3 1/12/98	35,420
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UNEMPLOYMENT	As at 3 1/12/98	4.6%	1,636
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PERSONAL WEEKLY AVG INCOME	\$423
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ESPERANCE PORT AUTHORITY

30/6/98 Imports	404,490
Exports	2,675,421
No. of Vessels 119	Total trade 3,079,911

HEALTH

Kalgoorlie has a regional Hospital. Esperance, Ravensthorpe, Norseman, Leonora-Laverton have district hospitals. Nursing posts are situated at Coolgardie, Menzies and Kambalda. First aid posts at Coona & Tjuntjarra.

TRANSPORT

The region is the gateway to the eastern states via the Eyre Highway and the east-west rail line. Road networks connect the region to Port Hedland in the north and Esperance to the South.

Main infrastructure and service needs of the Goldfields-Esperance Region

The National Competition Policy (NCP) has two broad thrusts. First, NCP extends the Trade Practices Act to cover government agencies and government trading enterprises that were previously exempt. Secondly, the States and the Commonwealth have agreed to implement a program of NCP compliance reforms in generally government owned industries which provide essential services and infrastructure (RDC 1998: p2).

The infrastructure markets most likely to be affected by NCP in the Goldfields-Esperance Region are energy, rail; telecommunications; and water. Banking is another essential service in the region but seeing it is not a service that is government owned, it is not discussed in this paper.

The current state of many of the region's infrastructure and service markets are of great concern to GEDC. Arguably, the current state of these markets is hindering the economic and social development of the region.

Energy

The Goldfields-Esperance Development Commission issued a paper in December 1998 called *Summary of Energy Situation and Issues in the Goldfields-Esperance Region*. Research for the Summary found that, while there are differences in the power situation in each locality, there are some broad issues that are relevant to all of them.

Dependence on resources projects

History shows that the region has depended on resource projects to create the demand and justify greater power generation in the region.

There is a circular problem that many resource projects will not start unless adequate power is available and power capacity will not be upgraded unless industry creates the necessary demands. For example, the major energy development planned for the Shires of Leonora and Laverton is a \$ 1 00m, 600km long natural gas pipeline from Geraldton to Anaconda Nickel Ltd's Murrin Murrin laterite nickel project (located about 60km east of Leonora). The power needs in the North-Eastern Goldfields are being driven by the private sector, not government. Likewise in Norseman, the town's power is generated by a contractor to Central Norseman Gold Corporation. In the Esperance/Ravensthorpe area the Ravensthorpe nickel mine and the O'Sullivan's power and gas project offer the best chance to upgrade the electricity infrastructure.

Size of the region' population

Some shires are too small a market to make any new energy projects and expansions viable. This is particularly so in the Shires of Menzies, Dundas and Ngaanyatjarraku where there are no major resource developments planned that may lead to new energy projects. Further, over the last twelve months, six of the nine shires in the region - Coolgardie, Laverton, Leonora, Menzies, Dundas and Ravensthorpe - have had declines in population (ABS 1999: p75). There is not a strong consumer market to pressure for upgrades in energy Infrastructure in remote locations.

Tariffs along the Goldfields Gas Transmission Pipeline (GGT)

The Goldfields Gas Transmission pipeline, which is owned by a private consortium runs 1 380km from Yarloop in the North West of Western Australia to Kambalda in the Goldfields. The OGT has a current capacity of around 88 terajoules of gas a day which will be increased to 164 TJ/d when 8 compressors are installed (OOE 1998: p43). Access to the pipeline is governed by, the *Goldfields*

Gas Pipeline Agreement Act 1994. Aside from recognising priority access rights to a portion of initial pipeline capacity by the consortium or their associate, the act provides for capacity to be available to third parties on a non-discriminatory basis at fair and reasonable tariffs.

The cost of GGT pipeline tariffs is a common concern throughout the region. A number of Kalgoorlie businesses are reluctant to enter into contracts with AlintaGas to deliver natural gas along the GGT to supply their energy needs. An example often cited is the slow progress of the Mungari Industrial Park allegedly due to the high tariffs charged by the GGT. Currently, the Legislative Council Standing Committee on Estimates and Financial Operations is investigating whether the GGT tariffs are "fair and reasonable".

Changes to regional power tariffs

As part of changes to regional power tariffs, the Office of Energy called for expressions of interest (EOI) for the supply of electricity on a commercial basis in the Esperance region on November 28th 1998. The basis of this supply will be on contract to Western Power, which will continue to distribute electricity to customers in the region. EOIs were closed on December 21st 1998, short listed EOI applicants will be invited to participate in the tendering process in early 1999. It is expected therefore that tenders will close in the second quarter of 1999. On December 30th 1998, Western Power and the Office of Energy announced that 23 EOI applications had been received. On May 10th, 12 EOI applications were shortlisted for tender. An additional application was added to the shortlist on May 11th.

There is still a great deal of uncertainty of what the final outcome of the EOI will be. The desired outcome is for there to be enough raw competitive pressure on tariffs to force down costs for commercial large energy users. Western Power will still not reveal commercial users of over 300,000 kW a year in Esperance for there to be an accurate measurement on the price changes that will occur under the new tariff structure. The greatest concern is that the terms of the EOI will not force a reduction in tariffs in Esperance.

Expected changes to diesel fuel excise

While many communities are looking to lower energy prices through natural gas, the changes proposed by the Federal Government to lower diesel from 43c a litre to 18c a litre will make diesel fuelled power stations just as, if not more, competitive than those fired by natural gas.

Rail

Kalgoorlie-Boulder is located at the junction of the Leonora-Esperance railway and the Perth-Adelaide railway and is the rail hub for the region. The town is the major rail catchment for towns and mining projects in the area.

Rail transport is of immediate importance because of the proposed privatisation of Westrail Freight Business. The Westrail Freight Sale Taskforce has recommended that Westrail's freight business be sold outright, together with rolling stock, depots, terminal and existing contracts. The land corridor and the railway track would be leased for a period of twenty years with a 15 year and 14 year renewal option.

A major infrastructure concern is that the condition of railways in the region is not downgraded as a result of privatisation. Maintaining all regional railways to a competitive standard will enable the region to benefit from competition.

Leonora-Esperance Railway Line

The major rail issue in the region is the condition of the Leonora-Esperance railway line.

Esperance is connected by a standard gauge rail line to Kalgoorlie. This line is used to move bulk commodities like diesel into the Goldfields and exports nickel concentrate and iron ore to Esperance Port. The rail line is a vital component of the region's strategic transport that supports the economic and regional development of the Shire of Esperance and the Goldfields Esperance Region as a whole.

The line is facing a number of critical issues. Portman Mining is evaluating using the Kwinana port instead of Esperance. Portman currently uses the line to transport iron ore from Koolyanobbing to the port for shipping. One of the main factors influencing the decision is that the railway to Kwinana is of a higher standard, which enables Portman to move higher tonnes more efficiently than the Goldfields-Esperance line. Anaconda Nickel is also considering using the Kwinana line for its Murrin Murrin operation for similar reasons.

GEDC is concerned that Esperance could lose business because of a lower standard, and therefore uncompetitive rail line. Also, government funding through the Australian Rail Track Corporation is being allocated to improving major inter city line: regional or spur lines are being ignored. It is estimated that \$35m is needed to upgrade the Kalgoorlie-Esperance section of the line.

If Portman was to stop exporting iron ore along the line through Esperance, the Esperance Port Authority estimates that approximately 35 direct jobs would be lost in the town of Esperance (Source EPA 1998: p2). Other positions in administration and maintenance would also be lost due to the decline in use of the rail line.

The Sale Taskforce has recommended that the operator of the privatised line be required to complete the \$32 million re-sleepering program of Kalgoorlie-Esperance line, subject to Koolyanobbing Iron continuing to export through Esperance.

Telecommunications

Telecommunications is critical because of the region's isolation and current inability to compete in global markets, but the infrastructure issue is complicated by, an intrinsic paradox. The need for modern telecommunications to bridge the vast distances between the region's business and social communities and markets is fundamental, but the widely dispersed population does not allow the development of business cases that are sufficiently strong to attract carrier investment in remote areas.

The North-Eastern Goldfields has been largely labelled as unviable by some carriers because the current low market demand for telecommunications is, at present, incapable of generating a reasonable return on capital infrastructure costs. Exceptions are the high telecommunication s traffic areas of Leonora, Leinster and the minesite at Murrin Murrin. A comprehensive community awareness raising program has been developed to generate a level of capacity and demand that will attract telecommunications carriers into this region.

The switch to CDMA digital coverage from analogue will in effect only upgrade but not extend existing services in the region.

The progress of e-mail and internet connections in the region is also progressing slowly. The region is hampered by there being too few on-line connections. This denies residents and businesses the full opportunities and advantages that are offered by such technology. The setting up of telecentres in the region, initially at Norseman and Coolgardie, is one way the State Government is trying to help people in remote areas access e-mail and the internet business cases. Based on minesite

demand for modern communications and data transfer capabilities, mining companies have the potential to attract service providers into the region.

Water

Most Shires in the region face a major fresh water problem. Some specific problems are: the high salinity levels in groundwater; the high cost of transporting water from Perth to Kalgoorlie via the Goldfields and Agricultural Water Supply pipeline; water quality; and questions regarding the ability of the Perth water basin to continue to supply the region.

This situation has seen new residential developments deferred because of high water prices, and severe water restrictions in the region have acted as a disincentive for people wanting to build permanent residences and create new industries.

Other Services

The region has other shortfalls in other government services. While these services do not strictly fall under NCP, they are a major issue among Goldfields-Esperance residents.

There is a teacher shortage problem in the region with between 8 to 10 teaching posts not filled at the present time. The region's isolation from Perth; teachers in Perth being unwilling to move from their positions; and the perceived lifestyle and cost of living in the region are contributing factors.

A number of Shires in the region experience infrequent contact with medical specialists. Some 60 per cent residents in the Goldfields-Esperance Region surveyed in the *Living in the Regions* report compiled by the Regional Development Council expressed "real concerns" about the lack of special medical services.

Impact of National Competition Policy on the Goldfields-Esperance Region

The Regional Development Council has produced two papers on the impact of National Competition Policy on regional areas. *Implications of Competition Policy for Regional Areas - An Overview* was published in June 1998 and expressed the RDC's concern that competition policy is implemented on the assumption rather than the demonstration of benefit to the community. The paper was critical that there was little consultation with regional communities and businesses which has fostered uncertainty about the impacts and benefits of public sector and micro-economic reform in regional areas (RDC 1998: p2).

The RDC also made a submission to the Senate Select Committee on the Socio-Economic Consequences of the National Competition Policy in September 1998. The RDC argued that the largely market-orientated competition policy will inevitably see regional communities treated inequitably, compared to major urban centres in terms of delivery of government services without adequate compensatory measures (RDC 1998: p4). Commercialisation of government services was having less emphasis on public need which in turn, would have a strong adverse affect on regional communities. The RDC further claimed that the NCP was being driven by urban based policy makers who had little understanding, of the impact of the policy on regional areas, or were generally unsympathetic to regional development (RDC 1998: p7).

The Productivity Commission issued a report in December 1998 called *Aspects of Structural Change in Australia*. While not focusing on NCP, the report did make some pertinent observations on the impact of structural change on regional areas. Most notably, the closure of a major business in a regional centre is likely to have a larger impact on the surrounding, community than would the closure of a similar operation in a capital city. This is because regional towns are often relatively specialised, with activity centred on a handful of core industries (PC 1998: p21).

The GEDC supports the broad thrust of the RDC's papers on NCP and with the observations regarding structural change by the Productivity Commission. There are four areas that the GEDC believes are relevant to the NCP in its application to the Goldfields-Esperance Region: the regions' economy; the region's isolation; the region's population; and infrastructure policy in the region.

Economy

The region's economy is one of the strongest in the State. As mentioned previously, it produces goods and services worth in excess of \$3 billion a year. Most of this wealth is produced from the gold and nickel industries in the Goldfields and the agricultural industries found in the South-East of the region. Because of the region's reliance on these core industries, the government infrastructure and services it receives is dependant on the strength of these industries. Projects linked to upgrading the electricity, water, gas and telecommunications markets have largely been predicated on major new resource projects proceeding. The problem is that many communities in the region are considered uneconomically viable and do not have resource projects to rely on for infrastructure and service upgrades.

The GEDC does not believe that the NCP will positively change this situation. The shift towards market-orientated government infrastructure and services will put **communities** in the region without a strong economic base even further behind. A case in point is the move to a national rail market in parallel with the privatisation of Westrail's Freight Services. The GEDC concern is that the new operator of this service will concentrate their efforts on improving the Kalgoorlie-Kwinana track which is part of the national rail market while paying minimal attention to the economically smaller but regionally significant Kalgoorlie-Esperance track.

Isolation

In terms of government infrastructure and services the region is very isolated from the rest of the State, let alone the rest of the country for NCP to have much of a beneficial impact. In terms of the WA energy market, only the City of Kalgoorlie-Boulder and the Shires of Coolgardie and, to an extent, Ravensthorpe are part of the South-West Electricity Grid. All the other Shires rely on isolated power systems run by Western Power. Likewise, the GGT only extends as far as Kambalda which means that a large part of the region has no access to any source of natural gas. Isolation is an enormously important factor in telecommunications coverage of the region. The vast distances between communities in the regions makes it very expensive for Telstra to even extend coverage of mobile telephones to these remote communities.

Considering WA's isolation from the emerging national energy and gas markets, any benefits provided by NCP are unlikely to be felt by this State. The lack of benefits are further compounded in regional areas like the Goldfields-Esperance Region which is isolated from some of the major infrastructure networks in the State. The GEDC believes the regions' isolation from most government infrastructure and service networks will not see any benefits from NCP.

Population

Coupled with its isolation from the rest of the State, the region's population is another factor against NCP working in the Goldfields-Esperance Region. Of concern to the region is the pattern of population growth. Between 1993-98 the region had a population growth rate of 1.9% per annum, but there were growth rates of great variation across each of the nine shires.

The two most populated Shires, Kalgoorlie-Boulder and Esperance had moderately healthy growth rates of 3% and 2.3% respectively. The Shire of Menzies had a growth rate of 3.6%, which while on the surface appears strong, the Shire is coming off a very low population base of 343 people. The Shire of Ngaariyatjarraku had the highest growth rate of all the Shires having 4.2% pa growth. However, the Shire is the poorest in the region in terms of resource projects, economic development and infrastructure. It does not have great capacity to absorb this growth.

Two Shires have virtually negligible population growth. The Shires of Leonora and Ravensthorpe possess a population growth rate of 0.1% and 0.2% respectively. Leonora's growth is especially worrying as between 1997-98, it had a population growth rate of negative 3.3%. An obvious cause of this is the reduction in the size of the large construction workforce at the Murrin Murrin laterite nickel mine.

Of equal concern is the three Shires that recorded negative population growth. These Shires are Coolgardie (-0.9%), Dundas (-2.1%) and Laverton (-4.8%). An obvious cause to this decline in population is job losses at gold and nickel mines like Higginsville, Bullabulling and Kambalda. These negative growth rates will have an adverse impact on the Shires', and the region's, ability to attract new infrastructure and services as there is not the market to support them.

Some have argued that the growth of "Fly-in/Fly-out" mining operations has caused the slow down in the region's population growth and something should be done to reverse the trend of these operations. Worth noting is the Department of Commerce and Trade's *Living in the Regions* Study. Only 49% of people in the Goldfields-Esperance region felt any affinity with the region (compared to an average across all regions of 73%), with employment being the being the main reason why people move to the region at 69% (regional average of 47%) and with 36% of the population indicating they would leave the region within 5 years. This highly mobile population with little affinity to the region is unlikely to see high growth rates in long-term settlement in the region.

The GEDC concludes that the region's current population demographics will always mitigate against it being able to attract new government infrastructure and services. The NCP is unlikely to change this situation as it is uneconomic for government infrastructure and service providers to cater for declining populations in isolated areas.

Infrastructure Policy

Experience of infrastructure policy at a State level, has made the GEDC uncertain about whether NCP will improve government infrastructure and service provision to the region as well. The GEDC has been cautious over third party access provisions which form part of the Westrail Freight Sale. The GEDC believes that the strength of the access code cannot be determined until they have been actually tested. Third party access to railway tracks is vital if the region is going to see competitive freight rates resulting from a privatised system.

Apart from the GGT, another energy market of concern to the GEDC is the tender for private power generation in the Shire of Esperance. As stated previously, the desired outcome of this process is for costs for commercial large energy users to be significantly reduced. However, the terms of reference for this process does not give the GEDC the confidence that this will be the case.

The GEDC is uncertain whether the NCP will generate enough raw competitive pressure on vital infrastructure and service markets in the region. The GEDC believes that some infrastructure policies at a State level has not engendered competition as promised and does not believe the NCP will make that much of a difference either.

Conclusion

In conclusion, the GEDC believes that the National Competition Policy will be of negligible benefit to the region. The region's government infrastructure and service markets are unlikely to ever feel the full benefits offered from the NCP. This is due to the region's economy; isolation; population; and past experiences with other infrastructure policies and suggested benefits that have not been realised. The region will also suffer other disadvantages as outlined in the Regional Development Council's reports on the matter.

The GEDC concludes that there is still a strong role for government to play in the provision of infrastructure and services as a community service obligation. While the region does have a strong economy, the benefits flowing from this are not seen across the region and much of the population are isolated from reliable government services. Further, the region's continued economic and social development warrants a high level of government support. A withdrawal of government support from the region could see the outstanding economic performance of the last decade generated for this country significantly diminish.

The economic benefit that Australia receives from this region demands a community service obligation to provide an equitable standard of services and infrastructure with coastal cities in Australia, not withstanding the NCP.

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