INQUIRY INTO THE IMPACTS OF COMPETITION POLICY REFORMS ON RURAL AND REGIONAL AUSTRALIA

SUBMISSION TO THE PRODUCTIVITY COMMISSION

TASMANIA'S WEST NORTH WEST COUNCILS NOVEMBER 1998

INTRODUCTION

The impact of National Competition Policy (hereinafter NCP) on rural and regional Australia is an issue of great significance when you begin to look at the ways in which our rural and regional areas are currently suffering. All over the country, rural and regional economies are suffering severe downturns, caused by the cumulative effects of economic restructuring, government cutbacks and policies, technology, globalisation and natural disasters. No one factor can be blamed for the situation totally, however, there is no doubt that some of these factors have had a greater negative effect than others. Some have had more recent impacts, whist others have been demonstrated for many years now.

National Competition Policy affects Local Government in a number of ways - as the level of government often described as being closest to the people, it is often called on by communities to take up their cause against policies of other levels of government, National Competition Policy being just one. Local Government is in itself affected by NCP, being required to take a long look at the way it operates, the perceived advantages of being a level of government and to make radical changes to the way it has structured or carried out its business.

In putting together this submission, Councils in this region do not doubt that National Competition Policy can provide significant benefits to larger organisations in metropolitan areas. Indeed, many have embraced NCP and its principles in their own organisations. What is of concern however, is the burden it may place on the rural and regional areas.

DEFINING RURAL AND REGIONAL AUSTRALIA

Government attempts at defining rural and regional Australia have traditionally failed most commonly because they have been non-consultative and often attempted to put "a square peg in a round hole." For some years now, there has been a preoccupation in trying to fit an area into the regional box, without taking notice of historical or pre-existing For example, during the time of the Hawke and Keating Labor Governments, Tasmania was described as one region for the purposes of the Regional Economic Development Program, and simultaneously described as three regions for the purpose of other programmes, such as the Regional Tourism Development Program where regions were given the opportunity to identify themselves. The current federal government has continued to use one region for Tasmania for the purposes of the Area Consultative Committees (Employment Advisory Committees), whilst a number of other federal programmes such as the Natural Heritage Trust (NHT) and the Regional Telecommunications Infrastructure Fund, encourage regions to develop around issues (although it is believed that the NHT was considering the use of bio-regions to define regions).

What this demonstrates is the difficulty of attempting to define rural and regional Australia - should a capital city such as Hobart miss out simply because it is a capital city, when the state in which is resides displays all the characteristics of a regional area? We would like to suggest, in response to the Productivity Commission's request for comments on this definition issue, that rural and regional Australia knows who it is - and that the community will define itself around the issue, as opposed to setting boundaries and lines

around the area. However, there is strong support for the approach outlined by the Commission in its issues paper, which sees rural and regional Australia (country Australia) including all areas other than the large metropolitan centres.

REGIONAL ECONOMIC AND SOCIAL CONDITIONS

In order to look at the impacts of NCP on the region of West North West Tasmania, it is important to learn a little about the current economic and social conditions. North West Tasmania is an area with significant natural advantages - however, it displays a declining population (negative growth in fact), it is experiencing a loss of its youth to mainland Australia and over the last 15 years, a loss of jobs in the realm of around 2,500.

North West Tasmania has higher than average unemployment statistics in all categories approximately 4% above the national average and the other regions of Tasmania. The region has steadily lost ground in participation rates, proportion of part time and casual work and proportion of population in employment. Whilst experiencing a very high level of youth unemployment, there is also now a worrying trend which shows extremely high unemployment levels in men over 40 years of age.

North West Tasmania has, like many other regional economies, experienced a period of economic change, and indeed, its economy is described as many as one in transition. The unemployment problems it is currently experiencing have been exacerbated by the creation of new technologies, the loss of infrastructure (which has seen companies close down regional offices and move to head offices in mainland Australia), tariff reforms and the impacts of the global economy.

North West Tasmania has historically relied on agriculture and mining for its development. Throughout the last century, agriculture was the principle activity and the steady growth which occurred was strengthened by the extension of the railways and the discovery of minerals in the 1890s. In the twentieth century, the growth slowed significantly, but the revival of the mineral industry after the depression had a positive effect.

Until the 1970s, the North West experienced a boom period which saw a considerable increase in value adding to the agricultural base and developments such as paper mills, vegetable processing plants, new crops, fish processing, limestone and cement, as well as expansion of the ports and passenger services. There was an expansion in transport related services, as a direct consequence of the developments in agricultural, timber and mineral industries. The establishment of companies such as Tascot Templeton, Australian Weaving Mills, Ovaltine, Tioxide and so on was welcomed as positive signs for the economy of the region.

The 1970s saw the beginning of a changed world for these industries - reduced tariffs, enormous technical and technological change, the loss of markets overseas and financial deregulation. North West Tasmania began to lose some its industries, whilst others began shedding jobs and contracting investment at an enormous rate. Other industries survived through management buyouts, development of niche markets and downsizing.

One of the greatest challenges which North West Tasmania is grappling with at present involves the decline of industrial employment. Industrial activity in North West Tasmania remains generally depressed and the area's historical reliance on large industrial companies to generate employment in the region has left it in a predicament. As in so many other regional areas with significant mineral resources, the downturn in world markets and the increasing automation of these industries has meant that these companies have downsized their workforces to a level where they are now almost non-existent. This fact, and the increased competition that now comes from cheaper imported products, has resulted in the decline of our traditional industry base. In this region, it has meant a loss of disposable income, casualisation of the workforce, shorter working hours and a lower take home pay, which has had a negative effect on the service economy which has traditionally existed around large industrial developments.

There is no doubt that North West Tasmania has found itself in the same downward spiral as a number of other regional areas throughout the country. It is suffering from a decrease in rural population, which sees people leaving the area, as well as industry decline. In its analysis for Tasmania's West North West Councils (Submission to the Senate Committee on Regional Employment and Unemployment - August, 1998), Insight Information Services found that the key causes for these inter-linked impacts are economic restructuring, increased mobility levels, employment centralisation and decline, and service decline. This was believed to show that the two impacts, population and economic decline are linked and feedback into one another.

The forces of economic change which North West Tasmania has experienced over the last twenty five years are symptomatic of the view that the new economic environment has severely disadvantaged those areas on the periphery of metropolitan Australia. The technological change, which is now sold as being of great advantage to regional and rural Australia, has occurred rapidly, and those with immediate access have received a competitive advantage over those without it. The time lag which occurs in extending these new developments to areas outside the metropolitan fringe has resulted in a concentration of business activity and services in central areas. It has also seen a centralisation of activity by many of the larger employers who previously operated offices in regional and rural areas.

The study found that these forces have not simply been restricted to a restructuring of the way companies do business - the exposure to the global economy has been very difficult for many local industries. The floating exchange rate means that returns are no longer predictable and can vary widely from week to week. Many local communities feel that governments have been too quick to adopt tariff reforms, which are believed to have brought some benefits to metropolitan purchasers rather than regional producers. There is also a view that Australian tariffs have been too readily reduced without similar concessions from trading partners. The extremely long process set out in legislation which is supposed to protect local industries from the threat of dumped paper, and the reaction of the Australian Customs Service to the issue of dumped paper imports which have had severe effects on North West Tasmania's paper industry, has also raised questions about industry policy and its economic effects.

IMPACT OF GOVERNMENT POLICIES

The recent study carried out by Insight Information Services for Tasmania's West North West Councils (as outlined above) commented on the effect that the lack of a regional policy has had on areas such as North West Tasmania. The study found that regional Australia has been disadvantaged politically by a concentration on suburban Australia, a lack of research and definition of regional problems, an unwillingness to intervene and a lack of a long term approach. Regional policy, the study found, suffers from the failure of the federal system in a number of areas, including definition of powers and responsibilities, rational distribution of finances, co-operation between all levels of government as well as national leadership.

Another issue which has exacerbated the situation that North West Tasmania now finds itself in relates to the cutbacks made by governments of all levels - there is no doubt that this has had the greatest effect upon marginal regional economies. As an example, North West Tasmania has lost a number of government offices which previously made a significant contribution to the economy - this can also be extended to banks and other organisations who have made a beeline out of regional Australia. These organisations gave people a reason to stay in the local area and do their business and they provided local jobs. Further, the loss of government funding in some areas has inhibited consumer choice, for example, courses once offered at the North West branch of the University of Tasmania are no longer offered due to government cutbacks. This has meant that many potential students from the North West cannot afford to go to Hobart or Launceston to do their course and so simply drop out of the education system and into the dole queue.

THE IMPACT OF NCP ON RURAL INDUSTRIES

Whilst this is not an issue which Local Government can talk with great authority on, as compared with agricultural associations for example, Councils are well placed to observe the effects of such changes on their local economies. As mentioned above, the economy of North West Tasmania has traditionally relied heavily on the ability of its agricultural industries to continue performing strongly.

There is great concern in our region regarding the effects of NCP on the dairy industry traditionally a strong performer especially in terms of its processing and export abilities. For example, the Circular Head municipal area (one of nine in the region) is responsible for approximately 40% of our State's milk production - there is great fear that the current dairy industry review, brought about by the requirements of NCP, will have a negative effect on the industry. Until the result of the review is known, no-one will have confidence to further invest in this industry and if the result somehow effects business in a negative way (through the exposure to the full range of competitive conduct rules, for example), what will this do to the economic future and the community of Circular Head?

Further to this, 80% of milk products manufactured in Tasmania eventually go to the export market - the industry considers itself to already have a strong global focus, and has performed strongly through the development of milk products and other forms of dairy food such as cheese, butter and so on. The deregulation of the industry is considered to

provide the potential for significant problems - in terms of its effect on quality, competing on a level playing field and again, the ramifications of these factors on the local economy.

The removal of mechanisms such as price fixing and supplier agreements is an issue of concern for regional economies heavily reliant on agriculture. Concern has been raised by Councils regarding the loss of price fixing mechanisms which provide some protection for producers who are significant employers and purchasers of goods and services from the local economy. It is believed that this has enormous ramifications for the incomes of not only those primary producers, but also the people employed on the farms and in the factories processing the product. This region has seen the negative effects of large multinational companies decreasing, on an annual basis, the bottom line price for vegetables they contract farmers to grow for processing. To a degree, in agricultural areas (such as vegetable crops like corn, peas, beans) where price fixing mechanisms have not traditionally existed, this region has seen the negative impacts already.

Whilst it is recognised that the ACCC can authorise certain anti-competitive conduct where there is a demonstrated net public benefit, one wonders how this process would work for the ordinary person trying to make a living - it has the potential to be extensive, time consuming and lengthy, and there is no guarantee of success. Further, what is perceived as a net public benefit by the community may not be recognised by the ACCC.

In our discussions with the Productivity Commission on this issue, Councils recognised that whilst NCP might be perceived as good for the country, it has little potential to be good for country Australia. Two of the major issues that we are dealing with in country Australia are unemployment and economic development. As mentioned above, North West Tasmania is experiencing high levels of unemployment and a contraction of economic development - NCP does little to assist in overcoming these problems. It exports jobs to highly concentrated and already populated areas away from the country areas which need them most. The same can be said with development, as it has become increasingly crucial to have links within or to the major decision-making centres.

The introduction of NCP reforms in country Australia has also created further potential for the loss of jobs with negative effects on the local economy. The contracting out of Council work not only provides the chance for a larger, national and international companies to win the jobs, thus putting local employees and companies out of work, but also means that eventually a monopoly is created as the large companies push the smaller ones out of business. An imported workforce may bring some economic benefits to the town (in terms of accommodation and food) but invariably as the jobs are completed, these people move onto the next town, leaving only a whole new group of unemployed people and a range of businesses who become quickly unsustainable. Further, and particularly in the service delivery area, the community may incur considerable additional costs in reestablishing service provision.

The legislation review programme is obviously going to take great time and effort and will no doubt have some positive effects. What is of concern however, is the effect that it will have on small business. In Tasmania for example, legislation covering shop trading hours prohibits businesses that have more than a specified number of employees from opening on Sundays. The small business lobby has fought hard for this protection as they perceive

that they are gradually being pushed out of the market by larger chains with national buying power. With open slather hours, the risk is run that a monopoly will eventually be created, as the smaller businesses find it increasingly difficult to compete.

The expansion of the larger chains into service provision areas traditionally outside their core business then results in other industry sectors declining as the big companies take over. There is great fear in local communities of the effect that this will have on local jobs and the economy. It also highlights the fact that NCP creates the potential for a whole new set of private sector monopolies to develop which may result in higher input prices for producers as well as higher product prices for country purchasers (something we in Tasmania have had to deal with for many years).

THE NCP RELATED INFRASTRUCTURE REFORMS

This is an issue of great interest to Councils, being the owner of some public sector monopolies. There is no doubt that this aspect of NCP reforms shows that the application of NCP in Tasmania is different to that in other States. The issues relating to gas for example, do not apply in Tasmania as there is not yet a domestic gas market of any consequence. For this reason, we will ignore gas in our consideration of NCP related infrastructure reforms.

Electricity

Tasmania's electricity costs have traditionally been low - in fact, thirty years ago they were reported to be the lowest in Australia. This situation has changed for the worst however, with electricity now costing more than Victoria and believed to be more expensive than other mainland states also for at least domestic and small business consumers.

The split up of the Hydro-Electric Corporation (HEC) into several units has occurred too recently to demonstrate whether there will be a positive or a negative effect. It is encouraging to note however, that some Councils are reporting a decrease in the cost of operation for areas such as sewerage plants, which is believed to be directly attributable to the separation of the network distribution cost which occurred when the HEC was split up.

Tasmania is currently experiencing a shortage of electricity supply which has serious consequences for the attraction of future investment and is currently hampering the desire to attract new industries. The agreement to form a competitive interstate electricity market presently does not involve Tasmania, although no doubt the progress of this agreement will be watched with interest, especially if the Basslink power cable connection to Victoria goes ahead. Tasmania is yet to experience any major competition in terms of electricity supply, although we are watching with interest the ramifications of moves by Crest Resources and Golden Triangle towards magnesite processing developments in the State which, because of their energy requirements, provide the potential for new suppliers in the market through an access arrangement with the current supplier, or at least, competition in the form of the supply of natural gas for the State.

The COAG framework for the efficient and sustainable reform of the water industry is currently being implemented in Tasmania, with a process currently underway looking at new water legislation which incorporates all the COAG framework requirements. The election of a new State Government resulted in a slowing of this process as things were put on hold, however it is expected that a final report/draft bill will be forthcoming in the near future. As a result of this, it is not possible to describe or quantify the effects of the reforms on North West Tasmania, however expectations have been included which demonstrate the perceptions that many have relating to NCP.

An extensive consultation process has been undertaken by the State agency responsible for implementing the framework, and it has demonstrated the fear that many country people have regarding the changes. State bureaucrats believe that the new State water legislation will change the way in which freshwater resources are used and managed, by:

- providing more consistent, equitable and flexible access to water for commercial users;
- encouraging more sustainable use of water;
- · changing the method of charging for water;
- giving greater protection to the health of water resources.

The draft legislation requires the development of a State Water Plan, establishing one government water manager as opposed to the several at present. Water allocations will be required for the environment and commercial water users will be licenced under one system. The legislation will introduce a system of transferable water entitlements and will provide for equitable and cost-reflective pricing. Existing water rights will remain the same, however, it is proposed to separate water rights from land titles to facilitate trading of rights.

The implementation of a system which includes allocations for the environment has raised the historical conflict between encouraging development and protecting the environment that has manifested itself throughout numerous issues in Tasmania. There has been some examples in North West Tasmania where rivers have almost dried up as a result of water flows not being let down from dams further upstream. It is difficult to quantify what effects the introduction of environmental allocations will have, but at this stage, it must be viewed as positive.

The consultation process identified that farmers and other water users have a number of concerns regarding these NCP related reforms. Any increase in water charges, which is expected to be the end result, is seen to be a direct impost on agriculture, which obviously will affect future investment, jobs and the local economy. The new pricing arrangements will have financial implications for water users and there is a fear that water trading will have disastrous impacts on land values and water availability.

Throughout the consultation process, meetings all over the State voiced the same concernthat COAG water reforms will simply equate to increasing unemployment. There is a belief, which has yet to be proven either way, that water prices in Tasmania will be pushed

up because of market forces. The cost of production for farmers will be increased with a flow on effect to consumers - again a negative effect for country communities.

The water reform issue is one of significance to Local Government in Tasmania - here, participating Councils buy water from bulk water authorities to supply to consumers at a cost (based on a standard unit price set across all participating municipal areas). In North West Tasmania, six Councils participate in the North West Regional Water Authority, established by them in the 1970s to provide a bulk water supply on a regional basis. Since 1987, the system in North West Tasmania has been based on a user pays philosophy which sees a standard charge set across the whole of the region. There are five treatment plants, each with different costs, but these are averaged out across the participating areas. Councils in North West Tasmania currently purchase water at a standard price and there is an industry discount offered for water purchases over 100 megalitres.

An enormous issue which Councils in this region have had to grapple with, in the water reform process, is the issue of full cost recovery. Through the passage of legislation, the Tasmanian Government took control of the North West Regional Water Authority some years ago, and in recent years has required a commercial rate of return from the Authority in line with all State Government Business Enterprises. Councils have taken issue with this on numerous occasions, as they feel that they have a community service obligation to provide a healthy and affordable supply of water to residents. The Government, on the other hand, has traditionally pursued a commercial rate of return overlooking the community service obligation and requiring the Authority to focus on profit based commercial motives for their service delivery.

The removal of cross-subsidies in water charges will no doubt have extremely negative effects on country areas. As described above in regard to the commercial rate of return requirement, the requirement to remove cross subsidies does not recognise that Councils should have the right to cross subsidies if all parties agree. The removal of cross subsidies will see the most isolated communities in our region paying more for their water and also makes it more difficult for Councils to choose to subsidise particular industries and provide development incentives.

REFORM OF GOVERNMENT MONOPOLIES

Telstra

The introduction of competition in telecommunications services in country and metropolitan Australia has been a significant step forward for many areas across the country. For North West Tasmania however, there has been very little evidence of any changes as a result of deregulation of the telecommunications market, most probably because of our small size.

There is no doubt that the competition provided by Optus in the long distance/mobile call market has led to a decrease in the cost of such calls. However, this is really the only identifiable competition that we have experienced. The size of Tasmania has meant that it is low priority for many of the newer telecommunications carriers and as such deregulation has meant little. In other words, in North West Tasmania (and no doubt in

other areas of country Australia), there has not as yet been sufficient competition in the provision of telecommunications services to achieve lower costs in a number of areas and good service - nor is their likely to be so for some time.

When discussing this issue, Councils raised significant concerns regarding poor service standards and commented that they believe that there has actually been a reduction in level of customer service that we receive. There appears to be problems with the co-ordination of maintenance, which may only get worse given Telstra's latest announcement that they are closing their job management centre in Hobart to relocate elsewhere.

There is no doubt that a competitive communications sector has allowed some businesses to remain in their local community. A perusal of the projects being funded under the Regional Telecommunications Infrastructure Programme demonstrates that the infrastructure required is being put in place throughout many regional or rural communities. It is too early for us to say whether this has assisted communities in terms of employment opportunities, however, one would expect that this would be so. Unfortunately, however, it has not stopped some Tasmanian businesses from closing down or relocating to mainland Australia, some for reasons other than telecommunications.

The consideration of issues relating to Telstra provides a good opportunity to discuss the issue of community service obligations. Currently, governments of all levels decide that the provision of a particular service should take the form of, or be justified in terms of, a community service obligation. What happens to these community service obligation when the organisation is privatised or corporatised?

In the case of Telstra, this organisation is currently responsible for the provision of community service obligations which are determined by federal government policies. It is suggested that dividends payable to the Government by such organisations as Telstra should be used to fund these community service obligations. An excellent example occurs in the area of untimed local calls, where it is federal government policy, as opposed to Telstra policy, to provide this service. This takes away the ability of Telstra to act in its best commercial interest which may then also have negative ramifications for country Australia (such as Telstra closing down country offices, local service centres and so on).

Australia Post

The recent promise from the Federal Government regarding the ongoing operation of Australia Post in a number of areas has been welcomed by North West Tasmania as a refreshing change from the announcements of closures of government services that we have become so used to.

The more isolated areas of the North West Coast rely on private operators to run post offices and one Council in this region actually operates its local post office as a community service obligation to an otherwise isolated community. This particular Council is able to do this having bought the licence from Australia Post.

Councils feel that it is important to retain local post offices as they provide an impetus for people to come into the particular town. If there is no postal service, then people go to

other towns which means dollars lost to the local economy. The arrangements made by Australia Post which enable counters in other businesses are seen as a positive alternative to the loss of an already isolated community's postal services.

COMPETITIVE NEUTRALITY AND LOCAL GOVERNMENT

The application of competitive neutrality to local government was not seen to be an enormous problem in principle, especially not for the larger local government authorities. However, what it has meant is the creation of an enormous administrative burden on large and small alike and some significant irritation regarding the financial costs of compliance.

The application of NCP to local government has required many Councils to restructure their workforces, both internal and external, as well as their financial management systems. It will require a review of all by-laws which may be seen as anti-competitive, whether or not they actually provide some protection for their local community. It has made it much more difficult for local government to decide to take particular actions based on a need to protect and promote jobs and economic growth in its local areas.

The introduction of NCP for local government has also meant that it will now become subject to prices oversight of its monopoly activities. Already, this has created an extra work burden with the first example being prices oversight of the three Tasmanian regional water authorities. This takes local government away from its core business, which is providing services to its communities. In Tasmania, Local Government will be required to make 29% of the effort towards meeting NCP goals, but under the arrangements between the State and Federal Government regarding competition payments, will receive only 4% of the NCP payments received by Tasmania.

Having said all that, the application of NCP to local government in Tasmania has raised problems regarding scale - the levels set for significant business activities in some states, such as Queensland, would mean that there were no significant business activities in Tasmania should the same level be used. In this state, a threshold of one million dollars was proposed for significant business activities, yet almost all Councils have decided to apply competitive neutrality to all their activities. There is some concern amongst small Councils however, that the implementation of NCP will result in the need to increase rates to cover the associated costs of administration.

With regard to the reciprocal taxation requirements that NCP introduces, there is some concern within Tasmania as to the cost of administering a taxation equivalence regime. Like all other governments, the imposts placed on Councils dollars are greater than the dollars themselves. To have to redirect funding away from the provision of important community services to meet the costs of implementing NCP would be irresponsible and could result in some Councils refusing to implement the policy. From discussion with the State Government, it appears that such regimes are both costly and complicated to maintain. There are still a number of issues that require determination before any judgement can be made. At this stage, there has been no final agreement regarding the administration of such a regime between State and Local Government, as the implementation of NCP has been delayed by the former Liberal State Government's

reform programme for Local Government. When considering this issue however, one wonders how the current plans for a GST will affect this area of implementation.

The opening up of government business activities to private sector service providers is viewed with great concern by many Councils - and this was alluded to earlier in the submission. Where Councils feel that they are being pushed to open up further areas of their work to competition, there exists an enormous concern that this will result in the loss of local content in Council works. In many country areas, the Council is the largest employer in town. There is real fear, where a Council believes it has a community service obligation to act as an employer and provide local jobs, that this will not be given significant consideration in any public benefit assessment. Councils feel that overlooking this will have an extreme effect on local economies that would threaten the viability and social fabric of the community.

CONCLUSION

Rural and regional Australia is suffering - every day, people are leaving to move closer to cities where there are jobs, businesses are closing and services are being withdrawn. All this in a political environment which seems currently to favour those who want to do business with Australia, as opposed to those in Australia who want to do business.

NCP has provided a new whole focus to these types of issues, and has highlighted that industry policy cannot simply focus on economically rationalist ideals. Whilst there are some benefits which can be identified for some parts of the country which are attributable to NCP, there are more areas in the country that feel that it is simply providing more of the same, removing the community's right to decide what it subsidises, how it does business and who it does business with. In some cases, this may only be a perception, however, if this is the case, then NCP has a seriously credibility issue which it will be difficult to overcome.

Councils in Tasmania have adopted the principles of NCP as they apply to their own organisations - some have embraced it wholeheartedly whilst others have done so extremely reluctantly, fearing for the resource consequences of their decisions. They wonder why, when rural and regional Australia is at one of its lowest ebbs, they must take specific actions which seriously endanger the ability of their local communities to survive.

It is our hope that the Productivity Commission can take into account these factors in its final report, and find a balance between the economic rationalism of NCP and the fears and feelings of country Australia. This will require a closer look at our current industry policies, an examination of other areas, such as Europe, who have shifted their approach to intervene directly in the problems being established in particular areas and the development of a strong and meaningful policy for regional Australia.

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