Prosperou

s Futures: Understanding the Potential of Australia’s Regional Cities

The Regional Australia Institute

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Executive Summary

The connection between the competitive advantage of a region and actual growth experience is complex. Some regions with a high degree of competitive advantage remain ‘below par’ in terms of economic performance or population growth, while other regions perform well in the sense of growth and development, despite being under-endowed with the competitiveness factors of other regions.

To understand how competitive advantage and growth can become more closely aligned, the Regional Australia Institute (RAI) is developing a series of case studies of successful regional cities, starting with Goulburn and Orange in NSW. This project seeks to better understand the differences between competitive advantage and successful regional development outcomes through the use of qualitative research methods.

The project is designed to identify areas for policy intervention in regions to foster potential and enable regions to understand and respond to external factors beyond their control. It will enable regions to consider how they can convert competitive advantage or other factors into growth.

Average ranking on [In]Sight: Australia’s Regional Competitiveness Index, Goulburn and Orange LGAs compared to national average, 2013 (see Chapter 3)

Source: RAI 2013, [In]Sight: Australia’s Regional Competitiveness Index
These two centres share several competitive advantages, including growing populations of more than 20,000 and close proximity to metropolitan hubs. However, while the two centres have strong competitive advantages, their economic profiles — and future pathways for growth — differ.

Statistical indicators highlight some common factors between Goulburn and Orange, from the size and age profile of their populations, to their employment profiles and industries. They both have relatively diverse economies and have experienced population growth. Nevertheless, qualitative analysis highlights the different characters of each city, providing insights into their strengths, barriers to reaching potential, and ultimate potential.

Both cities have been in transition over the past two decades. Both have been subject to changes in the economic arena with structural adjustment playing out in the decline of agricultural employment and closure of manufacturing businesses.

Despite these similarities there are differences in their relative outcomes. Orange has emerged in a stronger position, diversifying its industries to include tourism. Goulburn has also experienced growth, but it has been at a slower pace, showing less diversification.

Each community has managed their individual strengths and barriers quite differently. One of the most notable differences between the two cities is the level of confidence expressed by key leaders in each city. For example, despite the continued growth of Goulburn, recent work has shown a continuing lack of focus and confidence in the town and its leaders by both community members and local leaders.

A lack of focus and confident leadership limits communities, particularly the local economy. Without this confidence, organisations and individuals are significantly less likely to take the risks that often spur regional development. Without focus, they are unlikely to identify or realise their potential.

Themes which emerged from the interviews were around social capital, cooperation, conflict resolution and the interplay between people and institutional structures.

The communities of Goulburn and Orange have each generated energetic and enthusiastic leaders and the role of local government was seen as central. Despite both cities having clear competitive strengths they continue to be faced with change and diverse opinions about what the future direction of the cities should or could be.

One common element in both cities was social issues, particularly issues around disparity of wealth. The type of economic development and economic success envisaged in these communities is such that it can be enjoyed by the wider community, not just an elite group of entrepreneurs.
Regions that look similar from the outside can have very different futures. The success of Orange does not offer a pathway for Goulburn, nor does the success of Goulburn offer a pathway for Orange because, despite some statistical similarities, the two cities have different histories, cultures and geographies. Having different pathways does not mean that no lessons can be learnt from each other but it may mean the definition of ‘success’ is different in each location.

The findings from the qualitative research identified some ways forward for regional cities seeking to maintain and enhance their economic potential: make informed decisions; understand your community; identify common factors with other regions, and have confidence.

All regional cities need to have an understanding of what success is for their region. Before pursuing development, it is important for communities to understand the benefit to the region (jobs, wealth creation or community skills development). Understanding a region’s nuances and interactions is likely to bring about outcomes that are better aligned to regional circumstances, capacity and community aspirations.

Having the confidence to pursue a region’s potential is critical to success. The skills to achieve a community vision can be learnt and shared, but the vision itself needs to be influenced by the community. Aspiration is the most difficult factor in achieving a region’s potential.

The divergent outcomes for Orange and Goulburn reinforce the role of unique local factors in any region’s development and the importance of capable local leadership and entrepreneurialism in translating opportunity into prosperity.
Chapter 1: Introduction

1.1 Background to the study

The connection between the competitive advantage of a region and actual growth experience remains complex, and is often poorly understood. A region’s potential will be driven by both internal regional factors (endogenous) and factors from outside the region (exogenous). Endogenous factors will include: competitive advantage, local entrepreneurialism and leadership, while exogenous factors include market opportunities and the attraction or loss of mobile resources.

Factors may interact in a dynamic fashion. For example, a region may have the competitive advantage of being located near mineral deposits, however if the market for this resource is below the cost of developing these resources in the region, then this competitive advantage holds little immediate potential. If changes in technology or markets occur then the potential of this advantage can change rapidly. For this reason competitive advantage should be seen as only one element of regional potential.

1.2 Project objectives and research questions

This project has arisen from a confluence of several research interests, namely:

- Victorian government interest in regional city growth, specifically from Regional Development Victoria and branches within the Department of Transport, Planning and Local Infrastructure (DTPLI), for example, Spatial Analysis and Research (SAR), Regional Planning Policy and Metropolitan Planning Policy areas;
- National interest in regional competitiveness and development potential from the Regional Australia Institute (RAI);
- SAR research expertise in using qualitative case studies to support quantitative analysis to deepen the evidence base for regional policy makers.

The project involves a collaborative research arrangement between SAR and the RAI.

In November 2013, the RAI launched a project to understand how competitive advantage and growth can become more closely aligned. The research is designed to better inform future local action and government policies for sustainable, long-term growth in the regions.

To understand this relationship better, the RAI is developing a series of case studies of successful regional cities, starting with Goulburn and Orange in NSW.

These two centres share several competitive advantages, including growing populations of more than 20,000 and close proximity to metropolitan hubs. However, while the two centres
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have strong competitive advantages, their economic profiles – and future pathways for growth – differ.

The objectives of this project are to:

- undertake two pilot case studies using qualitative methods in order to test and inform the Regional Competitiveness Index and regional potential framework; and,
- assess the transferability of this qualitative method for use in other regions.

Key research questions include:

1. What factors, other than endogenous competitive advantage, affect regional development success?
2. How might such factors be better understood by policy makers in order to inform regional development policy?

The project will enable a clear articulation of the economic and non-economic factors which influence the potential of a regional city to succeed and prosper. The use of case studies presents a ‘real world’ picture of how regional cities can harness a variety of social, economic and environmental attributes to their long-term advantage.

1.3 Exploring regional potential

The competitiveness index provides one element of what may be termed ‘regional potential’. A conceptual framework for regional potential has been developed by RAI and is shown in Figure 1.
Of interest to this project is the potential disjunct between ‘competitiveness’ and actual growth (in terms of population growth or economic growth). Government policy tends to be focused on competitiveness factors (for example, investment in infrastructure and services), yet some regions with a high degree of inherent highly competitive advantage remain ‘below par’ in terms of economic performance or population growth, while others perform well in the sense of growth and development despite being under-endowed with the competitiveness factors of other regions. This disparity is recognised in OECD analysis of regional growth which found that having a set of competitive assets such as urban agglomeration did not guarantee high performance (OECD 2009, p. 21). At an international level there were also discrepancies found between national and regional performance with examples of successful regions located in underperforming countries and lagging regions located in countries with strong economies (OECD 2009, p. 54).

This project seeks to better understand the dynamic factors of regional potential through the use of qualitative research methods. This can deepen our understanding of the differences between competitive advantage and successful regional development outcomes. The question is a critical one for policy makers because much investment is based on a basic understanding of competitive advantage factors rather than an integrated understanding of the dynamics that may ultimately play a key role in development outcomes. Figure 2 outlines the links between current policy settings based on competitiveness factors and regional development outcomes using the regional potential framework. This framework highlights where the proposed case study research fits conceptually.
This paper intends to go beyond assessing competitiveness, and place it within the context of the elements that may frustrate or, alternatively, leverage competitive factors. This proposed framework for understanding regional potential will enable regions to consider how they may convert competitive advantage or other factors into growth. From a policy perspective, this framework is also intended to identify areas for policy intervention in regions to foster potential. The framework will also enable regions to understand and respond to external factors which are beyond the control of a region.

This dynamism is a crucial step forward from static planning approaches that are based on a single or small number of defined futures. Instead, assessments based on this framework will aim to define a range of trajectories for a region based on its current position and a balanced assessment of opportunities and risks. This dynamic approach will enable informed decisions about the development initiatives which are most likely to move a region towards the ambitions of its citizens and also create an ability to monitor change over time and adjust strategies accordingly.

If a region’s range of potential futures and the dynamism of its situation can be understood, then the risks and rewards associated with pursuing any particular outcome can be considered. Regional leaders, governments and others will be much better positioned to develop good policy and strategy that will lead to regions fulfilling their potential over time, despite changing market, social and other factors.
1.4 Project method

In order to make the qualitative case study work complement current quantitative work of the RAI, the first phase of the project involved a review of the RAI Regional Competitiveness Index. Focusing on the eastern seaboard competitive corridor a number of ‘hotspots’ (as identified by RAI) were examined with a view to better understand the key factors associated with highly competitive locations. Two initial locations were chosen for case study analysis on the basis of the following criteria:

a) The locations to be within driving distance of Canberra (for logistical and financial efficiency);

b) The locations to be regional cities with a population of more than 20,000 (i.e. relatively large regional cities);

c) The locations to have a ‘Highly Competitive’ rating on the Regional Competitiveness Index hotspot map;

d) The locations to have above-average population growth and/or economic growth as measured by the rate of population change and regional gross product.

The two locations chosen for analysis were Goulburn, one hour to the north-east of Canberra, and Orange, approximately three and a half hours north of Canberra.

Initial approaches in each city were done via Regional Development Australia agencies for which the RAI already had contacts. These initial informants had a broad knowledge of their local community and were in a position to support the project, identify and involve additional informants for interview purposes. Additional interview subjects were identified through the modified snowball approach used in previous Victorian studies such as those of: Stawell (DTPLI 2013); Industry Shocks (McKenzie 2012); and Lake Boga (Waters, McKenzie, et al 2010).

In each of the two case study locations, a series of 10-12 semi-structured interviews were undertaken. A total of 21 interviews, involving 23 people were completed with approximately half in each location (12 people for Goulburn and 11 for Orange). Those interviewed included people from the local council, local business groups, educational, cultural and social organisations. A list of informants by role is provided in Appendix 1.

The interview schedule was developed using the four elements of the regional potential framework:

- competitive advantage;
- external markets: opportunity and risk;
- the role of mobile resources; and,
- regional leadership and entrepreneurship.
A copy of interview questions is provided in Appendix 3. This full list was used as a ‘menu’ from which interviews were customised depending on the type of informant. For example, with business groups, greater emphasis was placed on asking about factors affecting business success whilst with council officers and public servants, emphasis was placed on policy factors. With the interviewee’s consent, the interviews were recorded and transcribed, taking into account appropriate privacy protocols.

Overall, the qualitative analysis aimed to include two perspectives:

1. Seeing whether people’s perceptions of their competitive advantage match with the profile presented through the competitiveness index; and,

2. Highlighting and exploring factors which are not measured by the competitiveness index but which may be significant in local economic development.

1.5 Additional data sources

Apart from the information gathered from the RAI competitiveness index and the interviews, data was also obtained from other sources. Statistical information on population and economy was gained using ABS census data. Planning and crime statistics were obtained from NSW Government online sources. For each case study area a review was undertaken of local and regional information via websites of: local government; business groups; community organisations; progress associations; and, local newspapers and publications. This review provided an understanding of local characteristics, community groups, activities and initiatives which may affect regional development potential. It also assisted in the identification of potential informants for the study. During the course of the interviews, additional publications and statistical summaries were provided and these were also used in the analysis.

1.6 Structure of the report

This report is presented in four main sections. In Chapter 2 an outline of growth trends over the past two decades will be given for Orange and Goulburn. In Chapter 3 [In]Sight: Australia’s Regional Competitiveness Index ([In]Sight), the RAIs competitiveness index, will be used to highlight areas of competitive strength in the economies of both cities. Chapter 4 will then present findings from the qualitative research. While some of the themes emerging will reflect themes used in the competitiveness analysis, other themes will be explored where they are likely to have an influence on the future development of these and possibly other regional cities. Chapter 5 will then examine how the quantitative and qualitative findings can be used to find ‘ways forward’ for regional cities. Conclusions are then presented in Chapter 6.
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Chapter 2: Orange and Goulburn – Measuring Growth

2.1 Population growth

The city of Goulburn experienced a slow decline in population during the 1990s and early 2000s, largely because of structural adjustment and associated industry closures. Since 2007 the rate of population growth has been higher – around 1% to 1.5% per annum (Figure 3). While Orange has experienced a greater rate of growth than Goulburn over the past two decades, its growth rate has been more volatile (Figure 3 and Table 1). Like Goulburn, though, it entered a period of growth around 2007.

Figure 3: Population and population growth rate, Goulburn and Orange, Statistical Area Level 2, 1991 to 2011

![Graph showing population and population growth rate for Goulburn and Orange](source)

In Orange, most of the population growth has occurred in the SA2 of Orange North which contains new suburban development. Central Orange experienced decline during the period which may be due to declining household size from population ageing or an increase in commercial land use over residential. When the two SA2s are combined, the city of Orange shows overall population growth. The SA2 of Goulburn includes both central and suburban areas of the city.
Table 1: Population growth, Orange and Goulburn, Statistical Area Level 2, 1991 to 2011

<table>
<thead>
<tr>
<th>Statistical Area</th>
<th>Estimated Resident Population</th>
<th>Average annual population change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goulburn</td>
<td>22,104</td>
<td>21,460</td>
</tr>
<tr>
<td>Goulburn Region</td>
<td>10,128</td>
<td>10,839</td>
</tr>
<tr>
<td>Orange</td>
<td>22,588</td>
<td>21,667</td>
</tr>
<tr>
<td>Orange North</td>
<td>10,168</td>
<td>13,657</td>
</tr>
<tr>
<td>Orange and Orange North combined</td>
<td>32,756</td>
<td>35,324</td>
</tr>
<tr>
<td>Orange Region</td>
<td>9,583</td>
<td>10,469</td>
</tr>
</tbody>
</table>

Source: ABS 2013, Regional Population Growth Australia, cat. no. 3218.0

In terms of demographic structure, Orange, Orange North and Goulburn share a typical regional city pattern of fairly even distribution of age groups (Figure 4). The surrounding areas of both cities, however, are typical of rural areas across the eastern states with a large ‘gap’ in the age groups 20 to 35 (Figure 5). This gap arises from the outmigration of young adults to larger cities for education and employment as well as for the social attractions which larger centres can provide. In many cases, regional cities are a stepping stone or staging post for young adults. They themselves lose people to larger centres like Sydney. Nevertheless, regional cities gain in older age groups as people move out of metropolitan areas seeking an affordable location to raise a family, treechange lifestyles or, for the oldest age groups, a place to retire or relocate for aged care services. Regional cities also gain older people from their hinterlands as people move in from smaller towns or farms in order to access services such as health or aged care.
Figure 4: Estimated resident population by age, 30 June 2012, Orange North, Orange and Goulburn SA2

Source: ABS, Population by Age and Sex, Regions of Australia, Cat No 3235.0

Figure 5: Estimated resident population by age, 30 June 2012, Orange Region and Goulburn Region SA2

Source: ABS, Population by Age and Sex, Regions of Australia, Cat No 3235.0
2.2 Economic growth

Like many regional centres, Goulburn and Orange provide high levels of employment in sectors such as retail trade, construction, health care and social services (Figure 6). Compared to Goulburn, Orange has a higher proportion employed in mining, education and manufacturing, but a lower proportion in public administration and safety.

The expansion of Cadia Valley gold mining operations near Orange in the past decade provides an explanation for the rapid increase in mining employment, while the presence of the police academy and prison, as well as those commuting to jobs in Canberra, account for Goulburn’s larger public administration sector. The higher proportion employed in agriculture in Goulburn may simply reflect the nature of the Local Government Area (LGA) itself, which includes rural areas. By contrast, Orange has a more tightly defined boundary around the city. In both cases, however, there is evidence of diversity in local industry sectors.

Both Goulburn and Orange have people moving in and out of the LGA for work. According to the ABS Census 2011, Goulburn Mulwaree saw an inflow of 1136 commuters from outside the local council area and an outflow of 2338 commuters, a net difference of negative 1202. In Orange the numbers are higher – 3953 commuting inward and 3512 commuting out, a net difference of 441.
Comparing place of work and place of residence for particular sectors shows some interesting differences (Figure 7). Mining shows a higher proportion of employment among residents, indicating that many people commute out to nearby mine sites. This makes sense in terms of the location of mines some distance away from the centre of population. Agriculture, forestry and fishing show a similar pattern in Orange suggesting that people live in the city and travel out...
to their place of work on nearby properties. A similar trend may be occurring in relation to Goulburn where farmers and farm workers choose to live in the city where services are greater. As the LGA of Goulburn Mulwaree contains more rural areas than does Orange, such commuting patterns would not be apparent in the LGA data. The trend of farmers choosing to live in urban centres rather than on the farm has been noted in other parts of Australia such as Victoria (McKenzie & Frieden 2010, p. 17). The other sector which has a pattern of net out-commuting from both locations is construction. In the case of Orange this may, again, reflect the location of the gold mine beyond the council boundaries and also the fact that it was still in a strong construction phase at the time of the census. In Goulburn, many construction workers may be accessing work opportunities in Canberra.

Figure 7: Employment by industry, Goulburn Mulwaree and Orange LGAs, comparing place of usual residence with place of work, 2011

Source: ABS Census of Population and Housing 2011

For other industry sectors there is a pattern of net in-commuting. Retail trade, education and training, health care and social assistance show a higher proportion for whom Orange or Goulburn is the place of work rather than the place of residence. Both cities have a strong role as the regional centre for such services and would therefore be expected to attract in-commuting workers from the broader region.
In terms of change in employment patterns over the decade 2001 to 2011 (Figure 8), both centres have seen declines in agriculture and manufacturing, a trend common to many parts of Australia, although both Orange and Goulburn saw declines greater than the NSW average decline in manufacturing of 1.3% (-0.5 for regional NSW). Declining employment in wholesale trade was also evident in both locations with Goulburn experiencing the loss of 350 jobs in that sector between 2001 and 2011. Much of this appears to have been due to modernisation within specific businesses such as the large Coles distribution centre (formerly Coles Myer), which has become increasingly mechanised over the period.

**Figure 8: Change in employment by industry, place of usual residence, Orange and Goulburn Mulwaree LGAs, 2011**

Source: ABS Census 2011 Time Series Profile, Table TSP33
Interestingly, both cities saw a strong increase in professional, scientific and technical services during the period. While such an increase may be in line with the image of Orange as a city attractive to professionals, the increase in this sector in Goulburn suggests a break with its traditional identity as a blue collar town. The impact of ‘treechangers’ and Canberra commuters living in the district (both within Goulburn and in its hinterland) seems to be reflected in the industry data trends.

Both cities have seen an increase in the size of their workforce over the past decade (Table 2). Goulburn has experienced a growth of 1,377 or 12% and Orange an increase of 1,698 or 10%.

**Table 2: Labour force change, Goulburn Mulwaree and Orange LGAs, 2001 to 2011**

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>2006</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orange</td>
<td>16,643</td>
<td>16,321</td>
<td>18,341</td>
</tr>
<tr>
<td>Goulburn-Mulwaree</td>
<td>11,604</td>
<td>11,923</td>
<td>12,981</td>
</tr>
</tbody>
</table>

Source: ABS Census 2011, Time Series Profile, Table 32

Unemployment rates in Goulburn and Orange have remained similar to, or lower than, the NSW average (Figure 9). Orange has seen a very strong drop in unemployment rates, falling from 7.3% to 4.5% since 2001. Expansion of employment opportunities in the mining sector may have been a contributing factor.

**Figure 9: Unemployment rate, Goulburn Mulwaree and Orange LGAs, 2001, 2006 and 2011**

Source: ABS Census 2011, Time Series Profile, Table 32
When different population size is taken into account, Goulburn has a higher number of businesses per person (Figure 10). Its historical role as a retail centre for the district may be a factor for this, although Orange may have a lower number simply because of the proximity of Bathurst, which provides a wide range of enterprises within a half-hour drive. It is interesting that the growth of Canberra’s retail sector has not dented the number of businesses in Goulburn to any dramatic degree, although qualitative evidence suggested that shopping in Canberra (an hour’s drive away) is becoming more popular.

Figure 10: Number of businesses per 1,000 population, Goulburn Mulwaree and Orange LGAs, 2007-2011

Source: ABS 2013, National Regional Profile
The levels of business entries and exits are higher in Orange relative to Goulburn (Figure 11). This may reflect a higher level of entrepreneurial activity, although it does fit in with the qualitative descriptions of Goulburn’s economy being ‘slow and steady’ rather than rapidly growing or fluctuating. The greatest level of exits, proportional to overall business numbers, were seen in 2008 – a period of economic difficulty for both cities at the end of the millennium drought. Since then, the proportion of exits has slowed in Goulburn but remains somewhat volatile in Orange. Business entries remained higher in Orange in each year since 2007-08, again suggesting a more dynamic business environment.

The profile of business types is actually quite similar in Goulburn and Orange (Figure 12). Construction businesses make up a higher proportion in Orange while agricultural-related businesses are higher in Goulburn, but these are the only two sectors where differences are greater than one percentage point. This perhaps reflects the similarity of service provision and business types in Australian regional cities, although further analysis would be needed to determine how much variation exists between centres across the country.
Figure 12: Number of businesses as a proportion of total businesses, by industry sector, Goulburn, Orange and Orange North Statistical Area level 2, 2012

Quantitative indicators only provide one perspective on the nature of cities. They do not show differences in culture or attitude that can differentiate places. Locations with very similar economic profiles can differ greatly in their identity. Understanding why identity can differ between two cities with similar economic profiles will be explored further in this report through examining qualitative data.

Source: ABS Counts of Australian Businesses, including Entries and Exits, Jun 2008 to Jun 2012, cat. no. 8165.0
Chapter 3: Measuring Competitive Advantage Through [In]Sight

The RAI has developed [In]Sight, an online index and interactive map tracking the competitiveness of Australia’s 560 Local Government Areas (LGA) and 55 Regional Development Australia (RDA) regions. [In]Sight spans ten themes and 59 indicators specifically tailored to reflect the fundamentals of sustainable growth in Australia, capturing the competitiveness of LGAs and RDAs according to current economic performance and drivers of future success.

**Institutions**
Public service; local government expenditure; development applications; regional government influence at state/national level; transparency of local government policy; clear roles and responsibilities in regional governance; financial burden of local government; local government assistance for businesses

**Infrastructure and essential services**
Aviation infrastructure; port infrastructure; access to tertiary education services; access to technical education; access to hospital services; access to allied health services; access to GP services; police services; road infrastructure; access to primary education services; access to secondary education services; rail infrastructure

**Economic fundamentals**
Building approvals; wage/labour costs; business confidence

**Human capital**
University qualification; technical qualification; lifelong learning; early school leavers; health; English proficiency; early childhood performance; school performance – primary; school performance – secondary

**Labour market efficiency**
Unemployment rate; youth unemployment; participation rate; skilled labour; welfare dependence

**Technological readiness**
Internet connections; broadband connections; businesses in technology-related industries; workers in ICT and electronics

**Business sophistication**
Economic diversification; dominance of large employers; exporters, importers, wholesalers; income source – own business; access to local finance; exports
Innovation
*Human resources in science and technology; research and development managers; presence of research organisations; expenditure on research and development*

Market size
*Size of economy (business); population*

Natural resources
*Mineral resources; timber resources; commercial fishing and aquaculture; coastal access; national park; net primary productivity*

The indicators mostly focus on economic drivers that determine longer-term competitiveness. The index provides rankings to allow comparison. ‘Together, the themes and indicators capture a region’s inherent ability to attract and utilise capital and labour efficiently to maintain and improve economic and social prosperity’ (RAI 2013).

According to [In]Sight, Goulburn and Orange rate relatively highly on infrastructure and essential services, reflecting their roles as significant regional centres (Figure 13).

**Figure 13: Average ranking on [In]Sight, Goulburn and Orange LGAs compared to national average, 2013**

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Source: RAI 2013, [In]Sight
The largest difference in ranking is on innovation. Orange has the advantage of having the NSW Department of Primary Industries (DPI) head office located in the city which has attracted a range of scientists and researchers to the city. The DPI was decentralised to Orange in 1992 and comprises a number of divisions such as: Science and Research; Orange Agricultural Institute, and Mineral Resources Division.

Goulburn ranks below the national average on the innovation indicator. Canberra hosts many research institutions, a factor which may be seen positively in terms of Goulburn being within one hour’s access to a much greater array of knowledge-based industries than is Orange, or negatively, in terms of such institutions not being located within Goulburn itself.

In the detailed list of rankings (Figure 14), Orange ranks more highly on institutions, particularly in relation to roles and responsibilities of regional governance and local government assistance to business. Interestingly, the city scores lower in terms of transparency of local government policy than does Goulburn, something which was reflected in qualitative findings discussed in the following chapter.

For the infrastructure category, Orange ranks more highly on aviation infrastructure and Goulburn on police services, which reflects the location of the NSW Police Academy and the Correctional Centre in town. In terms of economic fundamentals, business confidence appears higher in Goulburn which seems to counter the evidence from the interviews. Human capital factors tend to favour Orange where levels of lifelong learning, health and university qualification are higher. Goulburn ranks more highly than Orange on technical training. Labour market efficiency and technological readiness show less difference between the two cities although Orange generally is ranked higher. In both cases, the rankings are relatively low, especially in labour market efficiency where both cities are ranked over 200.
Figure 14: Ranking on [In]Sight, Goulburn and Orange LGAs, 2013

Source: RAI 2013, [In]Sight
Business sophistication is a category where Goulburn is mostly ranked higher than Orange, with the exception of income from own business and exports. The entrepreneurial nature of many businesses in Orange found via the qualitative interviews is in line with this.

Market size indicators are similar for both locations while natural resources presents a more mixed picture. One of the largest gaps between the two cities' rankings is for primary productivity where Goulburn ranks more highly than Orange. Given the smaller physical size of the Orange LGA, this is not surprising. It is of interest, however, that the city has successfully marketed itself on the basis of gourmet foods and wine, reflecting the primary productivity of the broader region.

As outlined above, Orange ranks highly on innovation indicators. It is worth noting that the index measures innovation in terms of formal institutions rather than reflecting individual innovative capacity. As stated by Shearmur:

> Each type of milieu, whether geographic or social, may have a role to play in generating, developing, and promoting innovation. This means that rural and urban places, small towns and large cities, the wealthy and the poor, those labelled 'creative' and those assumed not to be, may all participate, in their own way, in the innovative process, which is, after all, a social process before being an economic one (Shearmur 2012, p. S15).

In addition, the index does not measure social capital. Social capital includes relationships and networks of support or influence. A measurable element such as levels of education within a community does not fully reveal the processes through which people attain such education, the degree to which access and aspiration may evolve and affect outcomes. The value of understanding social relationships was highlighted in a qualitative study of young people in Goulburn undertaken in 2012.

> When interviewees were asked to describe what kind of community Goulburn had, they were much more inclined to draw upon the nature of interpersonal relations within the town rather than the landscape (O’Neill, 2012, p. 80).

Such relationships are not irrelevant to economic activity, and this was evident in Orange as well.

> We know a lot of professional people in the town and just in talking to them, one thing has led to another....a lot of them are people we went to school with or people we’ve known for a long time.... I used to notice it all the time in Sydney. If I met somebody that I had no network connection with, I could still end up working for them, but it was a much harder road. Whereas anyone that I was introduced to through an existing network, it was pretty much a given. (OR3)
Chapter 4: Qualitative Perspectives

The previous chapters have provided quantitative measures of economic development for Orange and Goulburn. Qualitative information is valuable to consider alongside the quantitative picture. In particular, it can provide a sense of dynamic aspects of otherwise static descriptors of a place. For example, human capital may be measured by education levels. But this alone will not give insight into the dynamic relationships which harness the potential of, not only formally educated community members, but also those who may contribute other skills or even just their passions and energy. Even seemingly immutable factors, like location or climate, become dynamic elements in terms of attitudes to them or the way they are perceived or promoted by a community.

Themes which emerged from the interviews included: social capital; cooperation; conflict resolution, and the interplay between people and institutional structures. In some ways, what the interviews have highlighted is the dynamic aspect of static elements.

4.1 Recent experience of change

Being a centre for agriculture, manufacturing and government services has meant that Goulburn has seen a great deal of change since the 1980s. Major adjustments included: decline of the wool industry; closure of the locomotive depot in 1986; outsourcing, rationalisation and eventual closure of the railway workshops. Other changes included: deinstitutionalisation; rationalisation and consolidation of government agencies; and the millennium drought of the 2000s followed by floods in December 2010. Economic restructuring continues and in recent times there has been closure or restructuring of businesses.

You’ve had Betta Electrical close down. Retravision has changed to a franchise. Some of our furniture stores are moving out of the CBD and they’re trying a different approach. The car yards have restructured. They’ve restructured for a whole variety of reasons, not just because of the market. Finance was probably the biggest issue for them, but there’s been a restructure there. (G5)

We’ve had a couple of businesses, there was a bookshop, our own bookshop that closed, we have some second-hand ones, and there was an auto parts shop that closed. They’d both been in Goulburn for over 30 years. (G6)

Retail business has been affected by such change with the move from older family-run businesses to larger chain stores such as Bunnings and Target opening. Such changes send mixed signals. On the one hand, the opening of large stores suggests the city is seen as having investment prospects, however the closure of long-term small businesses is taken hard within the community.
The various chain stores at the low cost end of the market ($2 stores and the like) are also seen as stigmatising the city as ‘poor’. In many ways Goulburn interviewees expressed a sense of being victims of change rather than participants or controllers of it. This air of helplessness is not shared by all, however it appears to feed a sense of anxiety which prevents a more confident approach or attitude to the future. The reality of Goulburn’s recent history is that it has actually survived a series of major changes.

Goulburn, I think, as a business community has been subject to change and has coped really well with it. For instance, when the bypass went in that was a major issue. The community ... got together and they adjusted. They adjusted to that change. They’ve adjusted to the downsizing of the railways. The railways have downsized over a period of time. A lot of those people moved out of the engineering workshops in railways and moved into engineering workshops in the local community. So, without realising it, they ... have adjusted to significant changes happening in the communities and adapted really well. (G5)

In the month prior to conducting fieldwork in Orange, the local Electrolux factory announced its closure. While this event gained much attention in the local media during the days following, by the time of the interviews the matter was mentioned relatively rarely. A number of explanations were put forward for this. First, the fact that those not directly affected may have little emotional investment in the issue; second, that the closure may have been foreseen, especially given downsizing of the operation in the previous decade. The third factor appears to be simply that, in typical Orange fashion, people were getting on with the job of dealing with it. This ranged from an immediate government response around training and certification, through to strategic planning for future jobs growth.

There’s some really great groups working on this, at the moment... We’re actually looking at, if funding is derived, potential opportunities for ... accreditation for their skills. (OR6)

Most people did see it coming I think. Fifteen years ago there were 2000 people employed there and there were other companies subcontracting and it’s been slowly whittled away. So I think for 90% of the population it’s probably just been ‘well how long is it going to last’... Look we’ve suffered big closures before with the abattoirs, the previous downsizing of Electrolux. It’s not without personal pain for people. You’ve got to be mindful of that. (OR7)

I guess it fits with that positive view that we like to take... We create about 300 jobs annually at the minute. [The General Manager’s] view, which is shared by us, is that we should be having a crack at adding 500 to those 300 over the next two years. (OR7)

It is interesting to note that Orange, like Goulburn, faced major water issues during the millenium drought and it too had to negotiate solutions, such as a pipeline. The way in which the town approached and dealt with the issue provides insight to the city’s character. Formal
consultation processes and expert input were one part of the story but so too was the way in which the ‘problem’ of water shortage was played down, whether by design or accident. In Goulburn, water shortage became both a political football and a negative identifier.

The control with which many issues are dealt with in Orange may be seen as a mark of professionalism. However, there is potential for such control to become rigid or limiting if the structures and processes become too staid. Responding to external shocks such as water shortage and drought appear to have been successful. The more recent shock of industry closure (Electrolux) is still playing itself out, however the positive characteristic of ‘getting in and getting things done’ appears to have begun with various agencies responding. Nevertheless, in both the water shortage and the Electrolux closure, the downplaying of impact may cover particular impacts on particular individuals and groups.

The terms ‘adaptation’ and ‘resilience’ are often used in relation to the ways in which communities and individuals cope with change. In common parlance, resilience can be defined as the ability to ‘bounce back’ after a negative event, whereas adaptation can be defined as the effective adjustment to a new set of circumstances.

The Goulburn community has shown resilience in terms of bouncing back from negative events such as industry closures.

*We’re big enough ... to have some fundamentals here that means that we will carry on. We’re not under threat of closing down. Despite all the doom and gloom about closing government services and all that that’s happened over time, what’s happened? Our population might not have expanded, but it hasn’t decreased either. So we’ve seen a shift from the public sector to the private sector, particularly with the railways closing and downsizing. We didn’t lose 10,000 people. We didn’t lose 5000 people. We actually kept those people.* (G5)

But in many ways they have resisted adapting to a new environment – one that requires a greater connection to external markets.

*I think they’re all struggling because the traditional model of retail is changing... One business in town told me that they are not going to go down that track [of modernising] for a whole variety of reasons. You go, ‘okay well that’s fine, but if you’ve made that strategic decision, that’s a whole market that you’ve just missed out on’.* (G5)

This observation is backed up by findings of a 2012 study of businesses in Goulburn which indicated a reticence of businesses to undertake expansion.

*A majority of respondents (62.6%) have suggested demand for their goods and services will increase over the next two years. However the worrying aspect is that this*
and the optimism in relation to positive profit and turnover growth does not equate to optimism in employment nor plans for expansion (CGC 2012, p. 27).

The study also found that local markets remained the key focus for many businesses in town with 77% of survey respondents indicating this as where they sold their products and services (Figure 15).

**Figure 15: Where Goulburn businesses sold products and services 2011**

![Bar chart showing where Goulburn businesses sold products and services in 2011.](source: CGC 2012, p. 19)

4.2 Leadership

The communities of Goulburn and Orange have each generated energetic and enthusiastic leaders. In Goulburn, many of these are home-grown, although there is a growing voice emerging from newer populations, such as ‘treechangers’. In Orange, many leaders are also home-grown although there appears to be a tendency for people in leadership positions to have had education or experience elsewhere, notably Sydney, and in the case of two of those interviewed, overseas as well.

Leaders and leadership styles in Goulburn appear diverse. The late 2000s were a critical time for institutions and individuals in the city. Pressures from drought and structural adjustment led to a crisis of confidence in longstanding institutions like council and the local chamber of commerce. This led to splinter groups and fragmentation, but it also led to several people ‘stepping up’ to leadership positions in the face of what they saw as poor performance of key organisations. In turn, these institutions have been forced to review their own roles and to

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1 According to the ABS National Regional Profile there were 2,451 businesses in Goulburn in 2011. The CRC Business Survey received responses from 174 (7.1%) of these businesses.
relate to the new groups which formed around them. This process is still unfolding and there are differences of opinion as to whether the fragmentation of effort has been a positive or negative development. One thing it has created is a clearer picture of the various interests in town and the development narratives that each expresses.

The contrast with Orange is strong. In Orange, there seems to be a stronger set of processes and protocols. There is a strong air of professionalism around these processes, although the structures can be difficult to penetrate for the newcomer seeking to be a part of established organisations. The style of leadership is more managerial and coherent than that of Goulburn, although the genuine passion that many Goulburn leaders have for their city is very apparent. In fact everything is more apparent in Goulburn; debates are carried out in public rather than managed and controlled. This can create a rather chaotic and contradictory set of processes, but the fact that key leaders are now able to work together in Goulburn (whereas in 2008 the arguments were too strong and raw for such cooperation to be viable) says something about the city’s ability to come together in spite of itself.

Goulburn is reaching a size where old patterns of governance may no longer be adequate or appropriate. The renegotiation of local government arrangements through the committees are an example of such tension. The challenges faced by organisations like the council and the chamber of commerce in the late 2000s are perhaps indicative of a system facing external pressures – in this case both environmental (drought and water shortage) and cultural (diverse groups demanding a voice). Such changes may well have taken place in Orange although council processes appear to be more controlled and controversies contained.

*It’s a very academic process. That’s the thing I’ve noticed in watching the [debates over development applications]... They want to actually get an expert in for their advice. Even the action groups and the response groups get their expert in... Whereas you go to other areas of Australia, where it’s just very emotive. There’s no business case. There’s no pragmatic approach to this at all. It’s just pure emotion. (OR6)*

This has the positive effect of fewer ‘bun fights’ but may also reflect a structure that is more closed to outsiders, or at least to those without an understanding of the legislative context for certain processes. Knowing the right person or the right protocols to engage with council appears important in Orange where there is a formality to proceedings, rather than the informality and accessibility apparent in some other local councils in the region.

*[Orange] council is hardest. I mean [the mayor] is a lovely guy and he’s really switched on as a mayor. I think he is super busy. But the staff I find are just ... I’ve been trying to meet [one officer] for god knows how long... A lot of other regions, they’ve been quite happy. I’ve just met with them. Put a name to a face... Come on people, it’s not that hard to say hello. I don’t know what it is with Orange council. (OR2)*
Interviewees in Goulburn had more to say about leadership than those in Orange. In Orange, the subject is perhaps less controversial or contested. On the one hand there is almost a distance from the issue, an acceptance that leaders are important and that the city has them.

I actually think [the mayor] is well accepted... He is respected... The State MP is well respected as well. So that does make a big difference too. (OR2)

The head honchos are really the driving force. They don’t only just drive it themselves but they must have the enthusiasm behind them and bring people with them. (OR7)

On the other hand there is also a widely held view that the character of Orange is one where people get on and do things, form coalitions in response to external threats and get things done. There is a confidence about this process; overall there is less angst about how things do or might work. Rather, many of the processes involved in running government or conducting business affairs are tacit and known, perhaps unconsciously by those in leadership positions in the town. This characterisation also accounts for the slight air of impenetrability around ‘how things are done’ in Orange. The rules of social discourse are controlled culturally through a tight network of people. At worst, this can lead to a level of pressure to conform to social and economic expectations.

What I would say here is people have very long memories. Very long memories and there are people that I’ve come across in my travels that have done the wrong thing to some moderate degree quite some time ago and they’ve never been forgiven. I think in a city like Sydney people acknowledge that business is so busy and there are so many people involved in so many different things that sooner or later everyone’s going to screw up and if they hear something bad about somebody they take it with a grain of salt. That’s not the case here. If you screw up here it really hits your reputation. (OR3)

Interestingly, the advent of the local gold mine has loosened some of what might have been regarded as ‘landed gentry networks’ in a former generation. New industry and new wealth may have opened up some of these tight networks to new leaders within the community.

I think we’ve actually moved past the old school networks now. I think perhaps in the agricultural sector it may be more present... But with the other groups, I think it’s moved beyond that. (OR6)

Another factor at play may simply be the process of ‘changing of the guard’ which appears to have caused angst in both case study locations.

I’m watching one organisation turn the guard over at the moment... I mean it’s very hard for the town elders to hand over to the next group and I think you’ll probably find that the whole way across the country ... there is a group of 60, 70 year olds that are struggling, but they want the new people to come in. (OR1)
In Goulburn, views on leadership are varied and contested.

I don’t think there is a well thought out framework for what is called leadership that everyone can talk about and know what they’re talking about. (G7)

We have some very serious leadership issues ... in council. (G2)

Although the discussion highlights different views and dissatisfaction, there were also examples where individuals felt compelled to ‘step up’ to leadership positions rather than simply complain about the situation.

I was grizzling and whingeing about our council like everybody else was, but I had this view that if you’re going to make profound statements about things, it’s either put up or shut up. So I thought ‘I’ve got no excuse not to put up’. So I put my hand forward, I got elected. (G4)

In both Goulburn and Orange, there was recognition that leadership capacity within the community was important.

I don’t think councils are the only place where leadership is, it’s also how does community leadership get developed for capacity building in the community. (G7)

I actually think there’s real scope ... for growing the capacity of leadership in communities in how to add value to our community. Just grow it like we are here to add value to our community. (OR1)

The openness of Goulburn’s processes extends to the community.

All those CEOs or leaders, we meet regularly. We don’t meet here. We’ll go and have a cup of coffee and we’ll get in the community. The local area commander and I will sit down in one of the coffee shops and ... we want to have a yarn. It could take 10 minutes, but we sit there for an hour and a half because people come to us and tell us things, ask us questions. (G3)

The idea that leadership is more than simply leaders is recognised in the literature as outlined by Beer and Clower (2013, p. 4):

One of the most recognized perspectives on leadership is the ‘great person’ approach to leadership. This paradigm emphasizes the characteristics and actions of individuals recognized for their singular achievements... Other perspectives focus on the context of leadership, and consider the ways in which different challenges call for varying skill sets and abilities. These approaches imply that individuals become community leaders as challenges that meet their skills arise, and that leadership is something shared amongst a group as no one individual has capabilities appropriate for all tasks.
On balance, the somewhat ‘messy’ approach to many issues in Goulburn allows mistakes to be made and parties to come together and try again. It potentially allows for more creative solutions, particularly now that newcomers to the town are involved in these discussions. The process can also be exhausting of local effort and this presents a real danger in terms of burnout and also in terms of the reliance on very strong characters emerging to wrestle the debate into some semblance of a vision.

You hit your head against the wall until it bleeds too much and then you think, ‘I’ve had enough’ and you get out and some other poor bugger steps up and takes the place. (G1)

The challenge becomes how to maximise the potential for creative problem solving with the least amount of damage or exhaustion for those seeking to care for, and grow, the city they love.

4.3 Cooperation and coordination

There were many examples given in Orange of people working in a coordinated way to solve problems or implement specific projects.

There’s an interagency thing we do with all the groups. It can be a bit hard to navigate, but once you get into it you can navigate it. It’s like Orange is this contained thing where you can find someone to do something. (OR5)

Nevertheless, this does not mean that everyone in the community is wholly involved.

I think in any given subject matter 5% of the population are interested and 95 think it’s either irrelevant or they’re ambivalent to it, so most of our consultation is focused around that 5%. (OR7)

There’s growing pain here. It’s an open democratic thing. That’s fine in Orange, lots of people have their say. But it’s a growing pain thing because the ‘green view’ isn’t the same as ‘I want jobs for kids’ view. The people who want jobs for their kids might be light green and the green people might be dark green and then there’s the ‘development at any cost’ people. There’s this great big mass in the middle of … the silent majority who are probably dispassionate about a lot of it. (OR5)

This is an important observation in that cities or towns should not be typified as having a single character. The efforts of a relatively small proportion of the community can effect critical change. In fact the success of Taste Orange, which is now a key brand for the city, was driven, in its early days, by a key energetic leader within the community.

She is the one that absolutely got it all together… She singlehandedly really changed the way that all those separate groups [worked together]. (OR2)
It is also something recognised by Kageyama – that it is not necessary to have everyone on board in order to initiate change (Kageyama 2011, p. 197). This should give heart to those in Goulburn who bemoan the lack of engagement by many in their city.

There has been a number of new groups formed in Goulburn in the past decade, often as a result of debates about development – the form it should take and the processes through which it can be achieved. Almost all of those interviewed wanted to discuss the issue of fragmentation, either for descriptive contextual purposes or for highlighting what is seen by many as a ‘problem’.

We tend to sort of splinter here a lot and have a group and someone says ‘oh, I think this isn’t going where it should’ and so they create a new one. I think that that doesn’t help Goulburn in putting a strong united front. (G8)

Goulburn Region Enterprise formed because they were unhappy with what the chamber of commerce were doing and The Goulburn Group formed because they didn’t think that there was enough focus on environmental-type things. (G2)

I think you also find that the reason we’ve got all these multiple groups is if there’s a falling out, they go and form their own group. So they fragment themselves. (G5)

While it is true that multiple groups can lead to duplication, the distinctive focus of the new groups in Goulburn and the fact they emerged in the late 2000s when Goulburn was facing a particular crisis around drought and water shortage, perhaps highlights the importance of what was happening at that time. Points of crisis are, in fact, important factors in discussions on leadership.

... contingency theory sees crisis as critical: the onset of a crisis or economic shock highlights the need to change processes and mindsets at the local or regional scale, which in turn energizes existing leaders and creates conditions that see new leaders emerge. Crisis may also generate new models or ways of growing within the region and encourage a shift away from stagnant or declining industries. In this instance, crisis can be seen to force communities and regions to learn new – more productive – approaches to development (Beer & Clower 2013, p. 4).

One outcome from this difficult period was a new structure around council committees with a greater focus on a smaller number of projects.

Then we changed our policy about all our committees rather than have them just being a pseudo-council, which is what they were. We just said, ‘we will give you a couple of tasks that we want you to see through and you can come back and suggest a couple of others that you might want to take on and that is the total of your focus’. So all of our
committees now are either given projects or put up suggestions and we identify them and they have no more than three going at any one time, so that you don’t have a two-hour talkfest about things in general and get nothing done. I think that’s contributed to the more focused efforts. (G4)

The three projects that we got the economic groups to focus on helped bring and focus energy. I still believe that that’s a really powerful tool to be able to stop us getting distracted... we now actually roll that out to our other committees. We actually said to our heritage committee, we said to our environment committee, our infrastructure committee, ‘you’re only allowed to have three projects. You’re not allowed to get another project until you’ve done one’. What we’ve done is we’ve really focused. (G5)

Curiously, the ‘rough and tumble’ of Goulburn’s political life has not led to lasting grievances. In fact the various groups and factions appear to be moving steadily towards a level of respect and cooperation. Few of the interviewees were able to explain why things had improved in recent years. Some suggested that the new structure of council with representative committees and a limited number of projects being focused on was part of the reason for improved relations. From an external perspective, the breaking of the drought and concomitant resolution of the water supply pipeline may have created a greater sense of hope. Events such as the celebration of Goulburn’s 150th birthday gave others a sense of new beginnings.

For me it was the turning point... I mean the 150th anniversary of us as a city on 14 March [2013] was to say ‘okay, we’ve got here, now where are we going and where are we going to?’ (G3)

Nevertheless, the different groups are still in existence, in fact their existence may be a necessity given that modern development does have to grapple with differing perspectives – social, economic and environmental. The three main business groups – chamber of commerce, Goulburn Region Enterprise (GRE) and The Goulburn Group (TGG) – are very nearly representative of these various themes and, as such, they provide the potential for an integrated perspective to be built around Goulburn’s future development options.

So the aims and objectives of the chamber, and the aims and objectives of GRE and TGG, are distinctly different and how we dialogue with one another is a pressing concern, sometimes it works well. (G7)

Another reason for improved relationships may actually lie in one of the few projects in Goulburn which seems to have won almost unanimous support – the local wetlands project. The wetlands project involved reclaiming waste land and restoring it to natural wetlands. On the face of it, this was an environmental project. Yet it also fulfilled a number of other objectives. These were stated as being:

- a way to negate the image of Goulburn as a ‘city without water’;
• a way to improve the civic amenity of the city; and,
• redeveloping a former waste dump site.

While the project was ‘uncontroversial’ in the eyes of one of its leaders, this perhaps undersells its significance. Given that it was, on the surface, an environmental project, the broader buy-in from local business groups and council is interesting. One aspect of the project was changing the perception of Goulburn as a town without water to one that had indeed recovered from the drought. This suggests that the drought was indeed a major factor in the anxiety felt in Goulburn at the end of the 2000s and the subsequent need for the community, as much as the outside world, to see that the city had recovered. The process of the project, however, is of even greater interest than perhaps interviewees realised as the cooperative and integrated model which it represented allowed for separate interests to come together and work towards a shared vision, albeit with different perceptions of the nature of what it was delivering.

The project was a cooperative one with support (time and money) obtained from environmental, economic, business and civic interests. The ultimate value of the project remains somewhat contested, especially around economic benefits, but it has nevertheless received widespread praise.

Interestingly the wetlands is the only thing that I’ve ever worked on that there has not been a single complaint or a single bit of negative comment that I’ve heard ever, not one. (G2)

It’s attracted a lot of attention and support because it’s viewed as a nice, potentially necessary thing that the city should have. (G10)

That’s been a really amazing example of council and the community working together for all kinds of wonderful outcomes, which has been really good. (G2)

The ultimate value of the wetlands project may be less about any environmental or economic benefit than an example of ‘strategic doing’ – a process, developed by Ed Morrison and others, which focuses on harnessing the collaborative energies of communities in order to achieve outcomes.

Strategic doing is a set of principles, practices and disciplines for implementing strategy in a network. Old models of strategic planning were designed for hierarchical organizations, and they do not work well. Strategic doing is different. It guides strategy across organizational and political boundaries with a discipline to build collaborations quickly (Morrison 2010, p. 2).

This type of collaboration is evident in several successful projects in Orange.
... I think it’s about using your networks and finding what kind of support people can offer. The groups that are formed at the moment in the Central West are particularly good at that. The skills group is very good at that, and we actually commit no funding to that project. All it is about is getting the players in a room, working out who should be doing what, who is funded to do what and let’s do it in a more coordinated way. (OR6)

The ‘strategic doing’ process has been used to change the fortunes of places through a networked approach to regional development rather than a ‘top-down’ model. While an outcome of the model is economic development, the community benefits that it delivers are significant as it harnesses the latent talent and energy existing in a community.

4.4 Institutions and governance

Both Orange and Goulburn have a range of public services and institutions. Both are the centres of their respective local government offices and each has regional offices of state government agencies. Orange has an advantage in being more clearly identified as a major regional centre – many state government offices for the wider region are located here. While Bathurst might be seen as a competing centre, its relative proximity allows easy commuting for government employees.

Goulburn has seen a wider spread of state and federal government locations within the region. The local Regional Development Australia office, for example, is located in Queanbeyan and the Department of Trade and Investment regional office is located on the coast in Wollongong. While this pattern of regional location causes angst for many in Goulburn, it does reflect the fact that Goulburn is now part of a wider network of settlements within a growing region, rather than the centre of a single hinterland. This changing pattern has presented Goulburn with a challenge in terms of identity and its perceived place in the world. Overlaid on this for residents of Goulburn is the fact that the historical narrative of wool and railways has been replaced by an unclear mix of public services, tourism and dormitory role.

In both Orange and Goulburn, the role of local government was seen as central.

I think there’s a big section of the community that might think ‘bloody council’ but for the most part of their lives they trust you to do it. (OR7)

Council needs to show leadership because it’s the only institution in the city that is given credibility automatically. (G10)

The fact the city of Orange is within a tightly defined Local Government Area was seen by some interviewees as making it easier to have a clear direction for the city.
It’s not a bad idea to be [this size] because [Orange council] doesn’t have all the issues of having to maintain the infrastructure outside its borders. So it’s got this feeling of we are a regional – a groovy regional city kind of thing. We’re not everything else... I actually reckon a big part of their success is just being that little city. (OR1)

Goulburn is making great efforts to improve the way in which it deals with potential new businesses. In the past it has lost businesses to other centres and this was attributed by some of those interviewed to not having been treated in a professional and friendly manner. While improving the ways in which prospective investors are dealt with, there may be a tendency with this new approach to see any new business as a good business. A great deal of energy goes into the struggle of determining the right direction it should have. However, without a strategic framework with which to assess the appropriateness or cumulative benefit of new enterprises, this may lead to conflict over the type of development which Goulburn attracts.

It is difficult to discern whether the very public debates and disagreements in Goulburn are a sign of a healthy democracy at work or a dysfunctional or disorganised local polity. The rough and tumble of debates over development and the future direction of Goulburn are notable, however, for the fact those most closely involved in bitter debates have ended up working together.

The antagonism, the heat and the venom that was in that antagonism for many years, just doesn’t seem to be there anymore. (G2)

Five years ago, maybe even less than that, as part of council’s committee structure, we had an economic development tourism advisory committee, and [four groups] had a seat at that table, but it was very dysfunctional and very disparate and completely non-progressive... but the interesting thing is that those personalities are still involved now... All of those people, who five years ago would have done everything they could not to be in the room with each other, they’re all around the table now and all really focused and on track and wanting to work together. (G6)

The size of Goulburn may also have reached a point where different structures and professional, transparent processes are becoming more necessary to gain trust and support from a widening constituency. The community is not only growing in size but also changing in character – treechangers and Canberra commuters have been added to the mix and this brings new ideas and new values to the table. Working through the inevitable conflicts has been heightened in recent years and, given the messy nature of this process, it may actually have been beneficial to have clearly identified interests – economic development, sustainable development, support for existing business and development of tourism potential. Now that these groups are formed, they each present a clear platform and voice for a particular aspect of Goulburn’s future development. The key challenge is not to limit the number of these groups, but to ensure there are ways in which the groups can interact productively. This is, in fact, starting to happen.
The Economic Development Committee of council ended up, it’s as much by design as
desire, with virtually a representative from each of those bodies on it and I think that
contributed to everybody realising, ‘well I can’t just get in and paddle my boat’. (G4)

It’s quite a functional working relationship these days which is quite an achievement, I
think. (G2)

While many in Goulburn bemoan the lack of a single direction, those sitting around the council
committee tables do in fact have something very important in common — a commitment to the
city.

The pay-off for me is to see this area flourish. It’s my home. I live here. I’m not going
anywhere. I want the best for my kids and, now, my grandkids. I’ve got another two
generations of me living here. (G3)

Such passion for one’s city provides the focus for Peter Kageyama’s book, For the Love of
Cities.

The mutual love affair between people and their place is one of the most powerful
influences in our lives, yet we rarely think of it in terms of a relationship... If cities begin
thinking of themselves as engaged in a relationship with their citizens, and if we as
citizens begin to consider our emotional connections with our places, we open up new
possibilities in community, social and economic development by including the most
powerful of motivators — the human heart — in our toolkit of city-making (Kageyama
2011, pp.vii-viii).

In Orange, emotional connection with the city is also evident.

There’s local champions that go out and get actively involved and they champion the
cause to local and state and federal and private industry as well. There’s the Bowen
Residents Group. It’s an identified troubled hotspot so they tried to fix it up, get
computers in there, a bit like a learning centre come social drop-in centre. (OR7)

There is an acceptance that those in leadership positions are aiming to make Orange a great
place to live — economically, socially and culturally.

4.5 Infrastructure and essential services

While both centres have a relatively high rank on infrastructure and essential services in
[In]Sight, a number of infrastructure issues were raised in the interviews. The lack of National
Broadband Network (NBN) coverage in Orange is seen as a limiting factor by many. While
there are fibre links in some of the new residential estates, the CBD and schools, there is a
demand for more coverage and higher speeds, reflecting the general sense that such
technology is an enabler of new business and service delivery opportunities. Furthermore, being 'left off' the NBN list is cause for some chagrin as the town prides itself on being technologically sophisticated in the way it does business.

The key transport issue in Orange appears to be the crossing of the Great Divide at Katoomba which is seen as a bottleneck in an otherwise good link with Sydney. In Goulburn, the major road infrastructure is generally seen as good and as having improved greatly over recent decades. The gap now seen by many is that of commuter rail or other forms of public transport. The Yass Valley is used for comparison as it has a more comprehensive bus service to Canberra than does Goulburn.

Health service provision was stated as very good in both Orange and Goulburn. Goulburn has a large hospital and aged care facilities which are seen as attractors for retiree populations. The proximity of Canberra enables relatively easy access to specialist facilities. Orange recently has had a major regional hospital development which also incorporates a psychiatric facility. Orange has historically been a centre in which medical specialists have located and some of these are seen as responsible for encouraging investment in the civic life of the community through their support of the arts. Being further from Sydney, the Orange hospital facilities provide services to a wide region west of the Dividing Range.

Both Orange and Goulburn were forced to invest in water infrastructure during the millennium drought. Reservoirs serving Orange fell to around 20% of capacity during the drought and council responded with both a pipeline proposal and an emergency potable supply using stormwater runoff. Goulburn also initiated a pipeline project to overcome the major impacts of drought that it was facing in the late 2000s. The desperate state of the town’s water supply was highlighted to gain political attention and attract funding for the project, after which the image of Goulburn as a ‘city without water’ provided a new challenge for locals seeking a more positive image for the city.

While the funding of infrastructure remains a hurdle for many of these aspirations, an example of a local co-funding arrangement in the Cowra region was highlighted during one of the interviews in Orange. The Blayney-Demondrille Line railway line was closed in sections between 2007 and 2009 and was badly damaged by flooding in 2010. Five of the region’s councils – Cowra, Weddin, Harden, Young and Blayney – have campaigned to have the line reopened to carry freight. A memorandum of understanding was signed between the NSW government and these shire councils in July 2013 to investigate how a regulatory and operating model for the lines could be improved. A call for private interest to restore, maintain and operate the lines on a commercially sustainable basis under licence has subsequently been made (ABC News 24th April 2013; NSW Department of Transport 2nd September 2013).
4.6 Education

The benefits of completing school and undertaking further study or training are well documented and extend beyond the simple outcome of a higher paying or higher status job. Lack of education has a range of health and social consequences, as well as economic. Gaining education is partly driven by access to educational opportunities and, in the case of Goulburn and Orange, this access is made possible through the variety of secondary, tertiary and vocational training institutions within the cities and in nearby centres such as Bathurst and Canberra. More recently, however, attention has been drawn to the matter of educational aspirations. These are defined as 'how far a student hopes to progress in school, and the degree of education they seek to achieve' (RPAC 2013, p. 26).

Aspirations and access combine to achieve educational attainment. Data show that attainment levels are consistently lower in regional areas. In Victoria, for example, in 2012 the apparent retention rate of Years 7-12 Victorian regional students in government schools was 20% lower than their metropolitan counterparts (RPAC 2013, p. 28). The same study identified key factors driving this difference in outcomes. Beyond the factors relating to personal circumstances or geographical isolation are a number of issues related to community.

Community and peer attitudes towards education are influential. Many regional areas have a strong tradition of early workforce participation and on-the-job training, rather than academic education. This limits the number of community role models who can provide encouragement. Such considerations are of increasing concern given the recent impacts of drought and flooding in regional Victorian communities, resulting in a diminishing agricultural sector, along with the closure of businesses in key industries, such as manufacturing, which in turn limit opportunities to pursue qualifications which are suited to the needs of the local community (RPAC 2013, p. 29).

The local TAFE sector in both cities works within a policy framework which emphasises areas of skills shortage and certification processes for particular industries such as childcare or aged care workers which have mandatory training requirements. There appears to be limited capacity for these institutions to move far beyond the government-directed courses.

There is a lot of energy but unfortunately the TAFE structure has found itself in a situation where they need to pursue programs that are going to allow them to be more self-sufficient. What that tends to do is actually minimise the range of programs and resources they’re able to deliver to the community. (G11)

TAFE’s the wallpaper, it’s always there and people don’t consider or think about it unless something then is taken away or we stop running a course. (G8)

Nevertheless, there are examples of tailored courses to meet particular local demands. In both locations, training initiatives appear to be important in times of industry restructuring – Goulburn faced a massive retraining program following closure of locomotive workshops in
1986 and further downsizing of railway operations in the 2000s. Orange is currently involved in offering services to those affected by the Electrolux closure, and it has experience in adapting apprenticeship training to meet the needs of the local engineering sector when they faced specific shortages.

Many of those interviewed in Orange saw the value of educational attainment. Orange has a slightly higher proportion of people with higher education degrees than the regional average (Figure 16). Nevertheless, they remain much lower than Sydney, a trend seen across regional areas in Australia (RPAC 2013). The issue of educational attainment was acknowledged in the Orange interviews.

> We do have a high percentage of people who are not following through their education. If I meet with the education guys they will, not that I know the figures, but they do say that they’re finishing early. They’re not going on to do further studies and they’re going into Electrolux or manufacturing. (OR2)

The value of gaining experience or education outside of the local area was highlighted by another interviewee.

> I think [many of our business leaders are] locally grown, the ones that I’ve seen. But at the same time, particularly with the mining guys I’ve seen, they’ve all gone away. They’ve been in industry and come back. So they might have stayed here ... grew up here, they’ve gone away and they’ve come back. We see a lot of that. The people that have either grown up here, gone and done other things and then come back and brought ... that knowledge back in. (OR2)

**Figure 16: Proportion of adult population with bachelor degree or higher, selected SA2 regions, 2011**

![Bar chart showing proportions of adult population with bachelor degree or higher in selected regions](chart.png)

Source: ABS Census of Population and Housing 2011
The issue of having sections of the Goulburn community with low levels of education was recognised.

*If we allow a certain section of the population to actually continue to be undereducated, underemployed etc., under-skilled, then they’re not going to be able to participate... So any economic development initiatives have to consider up-skilling the whole population including and providing young people in particular, I think, with the motivation to continue with education, and to see they actually could have a future in that town. (G7)*

An education deficit may play itself out in insularity – a potential lack of knowledge about the wider world. Education in a formal sense – that is the curriculum of study – is by no means the key to overcoming the limitations of knowledge about the wider world, however the process of acquiring an education, usually involving moving to another location or gathering experience from a variety of circumstances, sectors or locations, is significant in understanding how the world works. While Goulburn may be seen to have limitations in terms of entrepreneurial capacity or business innovation, models such as social enterprises may in fact be well suited to the city and may engender more grassroots business development within the town (Box 1).

Learning about or experiencing new ways of doing things can lead to a wider range of options and greater ability to respond to negative trends or unexpected events. A notable feature of the way those in Orange responded to events such as industry closure was simply a sense of *knowing* how things might be fixed – who should be contacted and how support could be harnessed.
Box 1: Social Enterprise Typology

<table>
<thead>
<tr>
<th>DEFINITION OF SOCIAL ENTERPRISE</th>
<th>Social benefit businesses that trade to fulfil their mission.</th>
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</table>
| MOTIVATIONS FOR SOCIAL ENTERPRISE| Employment
Businesses that provide employment, training and support for marginalised groups. |
|                                 | Service Delivery
Businesses that create or retain services in direct response to social or economic needs in the community. |
|                                 | Income Generation
Businesses that generate profits to support other community or not-for-profit organisational activities. |
| TYPES OF SOCIAL ENTERPRISE      | Cooperatives, Associations and Mutuals |
|                                 | Fair Trade Organisations |
|                                 | Intermediate Labour Market Companies |
|                                 | Charitable Business Ventures |
|                                 | Social Firms |
|                                 | Community Enterprise |
|                                 | Community Development Finance Institutions |
|                                 | Australian Disability Enterprises |


4.7 Business skills and entrepreneurship

A number of gaps were identified by interviewees in relation to the level of business skills in Goulburn. These ranged from technology to customer service skills. Overall, the capacity of businesses in Goulburn to interact with the national or global economy will be constrained by this lack of skill, yet there appears to be a reticence to improve the skills base among many smaller enterprises in town. This can range from a low value being placed on training and development, and an anxiety about being able to successfully compete with other areas, to a level of complacency or comfort from those who are running businesses for lifestyle rather than profit.

*I think there’s a distinct lack of business planning. There’s a distinct lack of working on the business rather than in the business. There’s people that are just busy doing. (G2)*
I think there’s a lot of small established businesses in Goulburn that, my own view would be, they probably don’t over-value training so much. (G8)

It is difficult to know how best to address the under-developed capacity of many small businesses. Different responses may be needed depending on whether the situation is fuelled by fear (of change, of new technology, of being unable to compete) or lack of aspiration.

Despite the generally gloomy view of business skills in Goulburn, the city is not without businesses who can capture wider retail markets.

Most of his customers are not from Goulburn... He sells top-end [products]. How many are going to be sold in Goulburn? Maybe one or two. Most of them are going to be sold in Wollongong, in Sydney and Canberra. That’s where his market is. (G5)

Orange has a well-coordinated web presence for larger activities such as Taste Orange and the associated FOOD Week. It also has individual entrepreneurs who are using the internet to access the large Sydney market.

There’s a cafe and bean roaster in town that has a massive profile over the internet for sales. [He] relocated from Sydney, [and now] he’s tripled his business into Sydney. (OR7)

Examples of businesses without internet presence or those for whom staff training and development requires too much time were evident in the Goulburn interviews. This may create a cumulative problem for a regional economy in terms of remaining up to date.

We, over the years, have run many workshops on marketing, packaging, social media, networking, and you name it... I guess we’ve tested everything, and it’s the same people that always come, which is great, but they’re the people who we didn’t necessarily need in the room. They’re the ones who were already doing it quite well, and are quite engaged and technologically minded, and happy to be progressive. Whereas it’s the others who are still on dial-up or don’t even own a computer. (G6)

You can’t just keep doing what it is that you’re doing. It seems like a lot of the business people here aren’t looking at what’s going on in their industry ... and saying, ‘okay, so in a couple years’ time if we keep going the way we’re going, the way that we’ve done business for the last 50 years ... nobody will be coming in ... so what are we going to do about that?’ (G2)

Although Orange showcases its successes more effectively that Goulburn, there was nevertheless a recognition that engaging a wide spectrum of business is difficult; some are willing and actively seek to develop competitive business skills, while others do not. One of the interesting findings from the qualitative research is that similar sentiments could be found in
each location on topics where, overall, the two cities might be regarded as different. For example, levels of technological capacity seemed to be higher in Orange over Goulburn – not surprising given higher educational attainment levels. Nevertheless, the following comment was made about businesses in Orange:

There’s some that will never move away from a cash register, it’s ‘what happens if the power goes out’, ‘what if’, see all the negatives and there’s others that are ‘this technology’s great, you’ve got to be on it’ and then there’s those in the middle who go ‘it’d be great but I just don’t have the time’. (OR7)

This suggests that we should be careful in stereotyping a location with a single simplified view. Issues around technological skills, capacity and uptake may be of more widespread concern in Goulburn but that does not mean the issue is absent from Orange. This type of observation also raises the question of how stereotypes develop, are maintained and even entrenched and whether such stereotypes can be overcome or changed.

Orange is fortunate in having a number of leaders in business who have introduced innovative ideas into the community – from the activities surrounding the annual FOOD Week, such as the ‘Forage’, to the introduction of sophisticated business management consultancies which are able to introduce new financial solutions for those seeking to expand or manage their businesses.

Our business model is to work with clients on a risk share basis. So either we take a success fee if we do a project that ends up in them winning a contract, we’ll take a percentage or if we work with them long term we want to have equity... A large part of the work that I’ve done in the past is consultancy on winning mandates for investment banks to perhaps list a company, run an IPO, whatever it might be and for those it’s really common to charge a success fee for that sort of work. (OR3)
This type of business is not a large employer although it has the potential to have long-lasting impacts on the way business is done in the region and, through the introduction of innovative approaches to business issues, it can contribute a great deal to the ongoing competitiveness of local businesses.

While Goulburn is seen as a good place for returnees to settle when they raise a family or for Canberra commuters to gain cheaper housing and an attractive lifestyle, the idea of leveraging the wider experience of returnees or newcomers was less evident. There also appears to be a lack of capacity in terms of entrepreneurial skills among young adults.

"Probably [setting up a business is] not really on the radar, from the people that I’ve had most of my experience with... it wouldn’t even be worth having those conversations, because I just know that they wouldn’t have the money." (G6)

"I don’t get a strong sense of [there being young local entrepreneurs in Goulburn] ... it’s not an obvious element at all. Well, that’s not to say there aren’t younger business people around but ... it may have something to do with perception more than anything else in that Goulburn is seen to be fairly settled and staid and that sort of thing." (G10)

This lack of entrepreneurial activity is problematic given the range of employment opportunities currently available in the city. Sectors such as retail and hospitality tend to have limited career opportunities at the local level.

"I think most of them are just working jobs, rather than career focused. That is one of the real challenges that we have in Goulburn ... there aren’t a lot of career opportunities. If you want something in retail or supermarkets or something like that, you will always find work. But finding full-time employment that will give you some career progression is really difficult." (G6)

There are some examples of successful locally grown businesses such as Divall’s Earthmoving and Bulk Haulage – a civil engineering and haulage company which undertakes earthmoving, quarrying, haulage and equipment hire. The company employs over 150 locals.

### 4.8 City identity – perception versus reality

Perceptions can be powerful. Orange prides itself on its civic culture – it is known for cultural activities such as theatre and music. Yet Goulburn also has a conservatorium, it has the longest-running theatre group in Australia and the local gallery hosts the Archibald Prize every second year. Orange has Banjo Paterson, Goulburn has Miles Franklin. The two cities may have different emphases and they differ in the proportions with high incomes, but they have similarities as well.
One of the curiosities of Goulburn is that its local narratives are often at odds with reality. For example, it is often seen as a social security town, a point recognised, but also rebutted, by some of those interviewed.

*I think Goulburn is unique in a lot of ways because of the belief that it’s a social security town and even if you talk to the chamber of commerce they will say to you that they believe it’s a social security town. They’re in fear all the time of the town going broke... This [cafe] will be packed in another hour as [will] all the eateries; the motels here are packed out all the time. Certainly some of the older style shops are struggling but they’re people that haven’t changed with the times. (G9)*

*We need to get rid of our stigma as being a social security town because our population of social security is no worse than any other city, really. (G9)*

*We don’t suffer a lot of the social problems that you get with a rapidly developing, high turnover community. That’s not Goulburn. Goulburn’s very slow and steady. Our growth is steady. (G5)*

According to analysis by NATSEM, Orange and Goulburn have lower levels of poverty than more remote parts of NSW, although not as prosperous as Canberra or Sydney (Figure 17). Goulburn’s proximity to Canberra offers economic advantages given the national capital’s prosperity. Although Orange is further from the State’s most prosperous areas, it has strong business links with Sydney which may facilitate capital flows.

*Figure 17: Estimated poverty rate by LGA, NSW and VIC 2011*
Income distribution in Goulburn also calls into question its image as a welfare town. Figure 18 shows income quartiles for both Goulburn and Orange using the NSW income distribution as a benchmark. By dividing the state’s income earners into four equal groups the income ranges are determined. The respective number of income earners in each of these categories in Orange and Goulburn then can be compared against the state benchmark. Both cities have lower levels of high income earners than the state average – this is not surprising given that Sydney tends to skew the NSW average. Orange does, however, have a higher proportion of high income earners than Goulburn. Goulburn has an above-average proportion in the second income quartile, but both locations show fairly average levels of low income earners.

**Figure 18: Income distribution of Goulburn and Orange compared to NSW, individual weekly income**

![Income distribution chart]

Source: ABS Census of Population and Housing 2011

Data for each city shows that the profile of selected government assistance such as family support payments and single parent payments are similar (Figure 19). There is some difference with Newstart (unemployment benefits), where Goulburn’s rate is higher, and for the student youth allowance where Orange has a higher rate. For other income sources, Orange shows a higher average income, although Goulburn has higher levels of income from superannuation.
Figure 19: Number of recipients of selected Government assistance payments, Goulburn Mulwaree and Orange LGAs, 2011

![Bar graph showing the number of persons per 1,000 population receiving different types of assistance payments in Goulburn Mulwaree and Orange LGAs, 2011.](source: ABS 2013, National Regional Profile, cat. 1379.0.55.001)

Figure 20: Average annual income by source, Goulburn Mulwaree and Orange LGAs, 2011

![Bar graph showing the average annual income by source in Goulburn Mulwaree and Orange LGAs, 2011.](source: ABS 2013, National Regional Profile, cat. 1379.0.55.001)
Overall, however, there is some difference in overall sources of income for both cities (Figure 20). In terms of ‘income from one’s own business’, Orange has a rate around 69% higher than Goulburn. This is not due to there being fewer businesses in Goulburn, in fact the number of businesses for every 1,000 resident population is 86.4 in Goulburn compared to 75.5 in Orange. This suggests that levels of profitability from businesses are lower in Goulburn. This may be partly due to the type of businesses in Goulburn – small retail and tourism-related – and also the lower income levels of many of Goulburn’s community, which limits spending power. However, the qualitative work also highlighted examples where aspirations for expansion were limited, an issue also highlighted in a local business survey commissioned by Goulburn Mulwaree Council in 2012 (CGC 2012, p. 27).

The popular image of Goulburn and Orange respectively would suggest a greater divergence in the types of indicators presented above. Even where there are factors that might explain Goulburn’s more negative image, notably the prison, this does not hold for other regional centres that also have such facilities, for example Bathurst. Another factor noted in Goulburn’s negative image, its cold winter weather, seems odd when considered against the fact that Orange too has very cold winters. Some interviewees went to some lengths in trying to explain the ‘issue’ of Goulburn’s negative climate image.

*If you lived in Wagga ... and you were going to Sydney on the old highway, you stopped in Goulburn. It was always grey, it was always cold and it was always miserable. So the stigma grew from the fact the city in the wintertime was not pretty. So the people now of my age that were stopping here as kids all they saw was this cold, miserable place where they had to stop for a pee basically and so it was never let’s go to Goulburn for holidays.*  
(G9)

Yet, at the end of the day, such explanations do not provide a solution to the problem of overcoming a negative narrative. Kageyama addresses the issue of cities with an ‘image problem’ such as Detroit or New Orleans and begins to tackle the challenge of changing entrenched narratives.

*Every place has a narrative. It is the story, legend or stereotype we use as shorthand to define and categorize a place. It is a useful device, but very often such narratives limit our vision of a place – and they can drown out important elements that don’t seem to fit within that agreed-upon narrative* (Kageyama, 2011, p. 129).

There are no easy solutions presented by Kageyama, although there are examples of cities that have made important changes in their image. For Australian regional cities which appear held back by a negative image, a fruitful way forward may be to examine in some detail the regional cities which have managed to turn themselves and their image around. This may include cities like Wollongong and Newcastle which have had to reinvent themselves after the decline of heavy industry.
Interestingly, having a high profile positive image can lead to a high degree of focus if something does go wrong, as noted in Orange:

> Seriously, one person gets released on bail, they have a two-week mad spree and it just blows our results out of the water and because we’re so proactive in promoting ourselves in tourism and relocation, [the response is] ‘what’s going on in Orange, oh look that’s worth a thing in the paper’. (OR7)

In Goulburn, such events are no more likely than in Orange\(^2\), however there does seem to be a different attitude to them.

> I mean there’s hardly ever an escape from [the prison]. If there is an escape the boys are on it pretty quickly. (G3)

Even a crime story can be turned into a feel-good community news item.

> ‘Thomas the Tank Engine rescued from drug lab’

Goulburn’s missing Thomas the Tank Engine – washed away in floods almost three years ago – has been found by police during a search warrant of a suspected drug lab in the east of the city. The popular kids’ play equipment used to sit at the Goulburn Historic Waterworks Museum on the banks of the Wollondilly River but was last seen floating down the river during the floods of December, 2010...

Police had executed the search warrant on suspicion the house was being used to manufacture drugs but they instead found Thomas in a carport. NSW Police issued a statement saying Thomas was ‘currently assisting Goulburn police with their inquiries into his whereabouts for the past three years’...

(Sydney Morning Herald 25th September 2013)

The wealth of Orange was recognised by some of those being interviewed as a key asset which allowed the city to have a higher level of social and civic amenity. There is some pride taken by those in council positions in relation to this emphasis on the ‘social spend’.

> So per assessment I think our figure’s around $180 per rateable property goes towards community services. Other regional cities might be a quarter of that. Yeah and that’s been like that for decades... So we spend on that, we spend on childcare centres and after school care and occasional care and health and aged care, so we’ve got a massive social agenda. (OR7)

\(^2\) In 2012, Orange recorded a higher crime rate than Goulburn. The ratio to the NSW rate of crime in Goulburn was 1.0 for violent offences (i.e. the same rate as NSW overall) and 0.8 for property crimes. In Orange the ratio was 1.8 for violent offences and 1.4 for property, both above the NSW rate (BOSCAR 2013, pp. 10-11). Note that crime rates can be a volatile indicator, especially in regional areas where relatively small numbers can skew results.
Council rates in Orange are significantly higher than in Goulburn and, in fact, higher than all but one other regional city in NSW (Table 3).

Table 3: Residential rates 2011/12, NSW regional city municipalities

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<tr>
<th>LGA</th>
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<td>Kiama</td>
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<td>Orange</td>
<td>1073</td>
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<td>Albury</td>
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<td>Dubbo</td>
<td>900</td>
</tr>
<tr>
<td>Wagga Wagga</td>
<td>866</td>
</tr>
<tr>
<td>Maitland</td>
<td>865</td>
</tr>
<tr>
<td>Port Stephens</td>
<td>836</td>
</tr>
<tr>
<td>Armidale Dumaresq</td>
<td>827</td>
</tr>
<tr>
<td>Bega Valley</td>
<td>814</td>
</tr>
<tr>
<td>Bathurst Regional</td>
<td>810</td>
</tr>
<tr>
<td>Griffith</td>
<td>808</td>
</tr>
<tr>
<td>Goulburn Mulwaree</td>
<td>796</td>
</tr>
<tr>
<td>Greater Taree</td>
<td>788</td>
</tr>
<tr>
<td>Clarence Valley</td>
<td>784</td>
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<tr>
<td>Deniliquin</td>
<td>764</td>
</tr>
<tr>
<td>Mid-western Regional</td>
<td>737</td>
</tr>
<tr>
<td>Tamworth Regional</td>
<td>729</td>
</tr>
<tr>
<td>Ballina</td>
<td>710</td>
</tr>
<tr>
<td>Eurobodalla</td>
<td>710</td>
</tr>
<tr>
<td>Broken Hill</td>
<td>674</td>
</tr>
<tr>
<td>Singleton</td>
<td>669</td>
</tr>
<tr>
<td>Kempsey</td>
<td>668</td>
</tr>
<tr>
<td>Richmond Valley</td>
<td>604</td>
</tr>
<tr>
<td>Lithgow</td>
<td>590</td>
</tr>
</tbody>
</table>

Source: NSW Department of Premier and Cabinet 2013

4.9 Confidence

Confidence is a trait usually assigned to people rather than places, yet one of the key impressions given by those interviewed in Orange was that of confidence.
They’re not ‘woe is me’ type of guys, they’ll have a crack at stuff. (OR7)

There’s constant barriers at every level, but we don’t see them. We just don’t – really we just don’t see that. (OR1)

Even one of the Goulburn interviewees, familiar with Orange, highlighted this feature.

[In Orange] they’ve been fortunate in some of the individuals who’ve been attracted there to set up businesses in terms of food and wine. That’s built up confidence of others to be able to take advantage of that. There’s a lot of smart people out there who have come off the land. People on the land, farmers, are essentially full-time business managers. So they’ve been able to take advantage of that as well. (G11)

Although those interviewed in Goulburn expressed passion about their city and its future, there was a sense of under-confidence in many of their assessments.

I think there’s a bit [of negativity] in Goulburn – even in this organisation. We all know what the problem is but no one’s got the solutions. (G5)

I think it’s an anxious community, by anxious I mean anxious about its future, anxious about its identity, and that plays itself out in politics and the ways in which people relate to one another, the confidence with which they will try new things. (G7)

One explanation for this difference perhaps lies in the recent history of each town.

Because Orange is a prosperous area, there is a lot of positivity, ‘we’ll have a crack at that’, rather than a negative story. That sort of leads to people either spending more or doing more business or better earnings or whatever. But there’s a degree of that sort of robustness in terms of positivity. (OR5)

They’ve seen so many things come and go, so it’s like ‘oh yeah, here we go again, this is another one, how long will this last’... So there is a tendency for scepticism or cynicism, to be the order of the day for a while. (G7)

Nevertheless, history alone cannot be the whole explanation because Orange, too, has seen industries close. There is nevertheless a confidence in responding to these events which extends, according to one interviewee, even to those directly affected by such events.

If you’re talking about my circle of friends and acquaintances and my neighbours, certainly there’s no ‘woe is me’. They just get in and do it. The Electrolux employees for example, I’ve had feedback from the manager out there that he’s very proud of the employees’ response. Instead of sitting there and saying ‘well let’s strike’, they’ve realised that this has happened. ‘We’ve still got a job for a year or two. Maybe if I start doing
some planning I can come out of it’ and what not. I get that sense from a couple of people that I know that worked there. (OR4)

4.10 Vision for the future

The location of Goulburn between Sydney and Melbourne has led to exploration of transport and logistics and archival storage being considered and actively pursued. Extractive industry is also an expanding industry in the region and benefits from proximity to major metropolitan areas. Orange continues to promote itself successfully as a destination for food and wine lovers – events in Sydney and Canberra are part of this promotion to a wider market. Orange also has the Cadia gold mining operation which appears set to have a long life of around 30 years.

Despite both cities having clear competitive strengths they continue to be faced with a deal of change and diverse opinions about what the future direction of the town should or could be.

There’s growing pains. Some would like to see [Orange] ring-fenced and preserved as Camelot. Others would like to see it grow so that their kids can have jobs here. (OR5)

Yes, they want to grow. Yes, they want jobs, but they don’t want anything to change. (G2)

In Goulburn, business organisations and council are actively seeking new opportunities for the city.

The days of agriculture and wool and manufacturing in this town are gone. So we broadened our horizons. Now we’re looking at education, more service government-based development. (G3)

Despite the opportunities available in both locations, there was a common view that much potential remains unrealised.

I’ve met people I had no idea about, that are doing great things. Quietly, silent achievers under the radar, we could be harnessing all that. (G7)

This potential is less about large-scale development projects or ambitious visions. It perhaps points to the type of potential being harnessed in many of the examples used by Kageyama (2011) and Morrison (2010). Such harnessing of grassroots potential can provide complementary development pathways alongside more formal economic development strategies. Ultimately they can contribute to community wellbeing and inclusiveness as well as the economic fortunes of regional places.
I think the skills project here is probably a really good model to look at for that, because there wasn’t actually a coordinated group like that, before... I think the real key with that model, is that we formed a community, not a committee. (OR6)

4.11 Strengths and barriers

Each interview ended with questions about perceived strengths of each city and barriers which were felt to be holding the city back from reaching its potential. Table 4 lists the responses to the question of ‘strengths’ or advantages in each location. These have been grouped by theme.

One of the key advantages of Goulburn is its location between Sydney, Canberra and the coast. This advantage was recognised by all of the Goulburn interviewees although, curiously, most referred to the advantage as ‘location but...’ The ambiguity of whether location posed an advantage or threat was explained in terms of the competitive pressures felt by the growing importance of these other centres and the lack of confidence in what the outcomes of such competition might be for Goulburn’s economy.

I think a definite strength is our location, but in saying that, it’s also a threat and a weakness. (G6)

I firmly believe that our strategic advantage is also our strategic disadvantage. Proximity to Canberra and Sydney, great, but it also means that there’s no reason why you have to move either. If you run a factory in Campbelltown, why do you need to come to Goulburn? (G5)

Being very close to Canberra is an asset, but it’s drained some of the life out of Goulburn. (G7)

This ambivalence seems to reflect a lack of confidence in dealing with the changing position of Goulburn in relation to other centres in the region. The list of strengths provided by Orange respondents has a great deal in common with those from Goulburn, yet there was almost no ambivalence in the way these strengths were expressed. Even its location, three and a half hours from Sydney, was seen as an advantage in terms of proximity. Whether three and a half hours is seen as close or distant seems to be a question of perspective – a glass half full rather than half empty. In Goulburn, proximity to Canberra or Sydney was just as likely to be seen as a problem than an asset.
### Table 4: Reported strengths of Goulburn and Orange

<table>
<thead>
<tr>
<th>GOULBURN</th>
<th>ORANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PLACE</strong></td>
<td><strong>PLACE</strong></td>
</tr>
<tr>
<td>location (x9)</td>
<td>location – distance from Sydney (x4)</td>
</tr>
<tr>
<td>proximity to Canberra and the ACT (x3)</td>
<td>beauty/amenity (x2)</td>
</tr>
<tr>
<td>climate</td>
<td>climate (x2)</td>
</tr>
<tr>
<td></td>
<td>geography/geographic diversity (x2)</td>
</tr>
<tr>
<td><strong>PEOPLE</strong></td>
<td><strong>PEOPLE</strong></td>
</tr>
<tr>
<td>community spirit (x2)</td>
<td>lifestyle (x3)</td>
</tr>
<tr>
<td>secure and welcoming lifestyle</td>
<td>good food and wine culture</td>
</tr>
<tr>
<td>advantages for family life</td>
<td>country feel (x2)</td>
</tr>
<tr>
<td>versatility/diversity</td>
<td>sense of community (x2)</td>
</tr>
<tr>
<td></td>
<td>vibrant and progressive community</td>
</tr>
<tr>
<td></td>
<td>people capacity – getting on and doing things (x2)</td>
</tr>
<tr>
<td><strong>PROSPERITY</strong></td>
<td><strong>PROSPERITY</strong></td>
</tr>
<tr>
<td>strong base to economy</td>
<td>economic diversity (x3)</td>
</tr>
<tr>
<td>size and stability</td>
<td>large businesses in town</td>
</tr>
<tr>
<td>infrastructure (x2)</td>
<td>infrastructure and facilities</td>
</tr>
<tr>
<td>access to health facilities</td>
<td>the city has money</td>
</tr>
<tr>
<td>affordable/alternative to metro</td>
<td>lower cost (than metro) can be a creative enabler</td>
</tr>
<tr>
<td></td>
<td>lifestyle is recognised as economic driver</td>
</tr>
<tr>
<td></td>
<td>human capital is harnessed</td>
</tr>
<tr>
<td><strong>PROSPECTS</strong></td>
<td><strong>PROSPECTS</strong></td>
</tr>
<tr>
<td>it has potential (x3)</td>
<td>good leaders</td>
</tr>
<tr>
<td>history – its place in Australian history</td>
<td>networks and connectivity (x2)</td>
</tr>
<tr>
<td>water security</td>
<td>awareness of its place in the world</td>
</tr>
</tbody>
</table>

Source: Goulburn and Orange interview participants 2013

Responses listed under the heading ‘prospects’ are of interest because they also seem to reflect the same elements of ambiguity (Goulburn) and confidence (Orange). This is perhaps most notable in the appreciation of Goulburn’s ‘place in history’ versus Orange’s ‘awareness of its place in the world’. Goulburn has a strong sense of ‘potential’ but is unclear exactly what that potential is. One way of approaching this dilemma may actually be to consider what aspects of the past are still of value and relevance in the modern context. Moving forward does not have to mean throwing out everything from the past that a community holds dear. The following description of a community event in Goulburn expresses a great deal of nostalgia but also highlights an existing strength of the city, that of community spirit, which is celebrated in a highly inclusive manner through festivals and street parades.
We’ve just celebrated our 150th anniversary, which was a fantastic celebration... We had a street parade, which was the best we’ve ever seen. It really was unbelievable... We haven’t had a parade like that in 40 years... It brought everybody out. Everybody was happy. You never saw anybody who wasn’t enjoying themselves. It was just one of the nicest days I think I’ve seen in Goulburn. A whole part of it was the fact that people cared for the town, for the city. They showed their love for our region, for our city and it was just – it was a real pleasure to serve... It was a real community spirit. I call it community spirit. (G1)

Respondents’ views on ‘barriers’ to reaching potential were more varied – both in terms of the two cities having different types of issues and in terms of the range of local or external, micro or macro, general or specific items (Table 5). Many of the issues reported in Goulburn related to attitude, an interesting point given the conclusion of this study that confidence was a major difference between the two centres.

Table 5: Reported barriers to reaching full potential in Goulburn and Orange

<table>
<thead>
<tr>
<th>GOULBURN</th>
<th>ORANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ECONOMIC</strong></td>
<td><strong>ECONOMIC</strong></td>
</tr>
<tr>
<td>land ownership issues in main street</td>
<td>access to outside money</td>
</tr>
<tr>
<td>hesitation to invest by local businesses</td>
<td>the way in which funding is attracted</td>
</tr>
<tr>
<td>attracting new business and viable business</td>
<td>capacity of construction industry to meet demand</td>
</tr>
<tr>
<td>lack of tourism development</td>
<td>the image of not having water – loss of business</td>
</tr>
<tr>
<td>need to celebrate the rich history</td>
<td>cost of housing (x2)</td>
</tr>
<tr>
<td>need to tidy up the town a bit</td>
<td>visitor accommodation – more needed</td>
</tr>
<tr>
<td><strong>INFRASTRUCTURE</strong></td>
<td><strong>INFRASTRUCTURE</strong></td>
</tr>
<tr>
<td>public transport to Canberra</td>
<td>infrastructure limitations</td>
</tr>
<tr>
<td></td>
<td>transport link to Sydney needs improving (x2)</td>
</tr>
<tr>
<td></td>
<td>telecommunications limitations</td>
</tr>
<tr>
<td></td>
<td>lack of NBN</td>
</tr>
<tr>
<td><strong>ATTITUDINAL</strong></td>
<td><strong>ATTITUDINAL</strong></td>
</tr>
<tr>
<td>its own self-image</td>
<td>the way we communicate ourselves to outside world</td>
</tr>
<tr>
<td>anxiety – fear of not keeping up</td>
<td></td>
</tr>
<tr>
<td>its mindset</td>
<td></td>
</tr>
<tr>
<td>apathy</td>
<td></td>
</tr>
<tr>
<td>complacency</td>
<td></td>
</tr>
<tr>
<td>negativity</td>
<td></td>
</tr>
<tr>
<td>its customer service</td>
<td></td>
</tr>
<tr>
<td>stigma of thinking Goulburn is a social security town</td>
<td></td>
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<td></td>
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**RESPONDING TO CHANGE**

Electrolux closure – need to manage impacts
unexpected events – need to manage impacts

continued over...
RESPONDING TO CHANGE
unwillingness to face harsh realities
dislike of change
reticence to be part of global community
reluctance for residents to accept change
protectionism and self-interest

HUMAN CAPITAL
need more educated, corporate thinkers who’ve spent time out of the town
more people need to follow through their education
need to understand value of regional investment

ORGANISATIONAL
council needs to facilitate business investment
lack of one direction

SOCIAL
low socioeconomic group in the community
social problems
reinvigorate social capital in the community

POLITICAL
getting message to government that we are here
safe seat problem
lack of common voice

IMMUTABLES
climate

SOCIAL
disparity within groups in the community

IMMUTABLES
its location

Source: Goulburn and Orange interview participants 2013

One common element in both cities was that social issues were highlighted, particularly issues around disparity of wealth. Hence the type of economic development and economic success envisaged in these communities is one where the wider community can enjoy the benefits of such success, not just an elite group of entrepreneurs. Ironically, Orange, with a greater level of higher education, still regards education as an issue, with a need for greater levels of school completion being desired. This also extended to a recognition that corporate thinkers needed to have both formal education and experience outside the city in order to best contribute to Orange.

The list of barriers in Goulburn, while notable for its honesty and self-reflection, is somewhat inward looking. Other regional centres in NSW which have been successful appear to be regarded as having received special attention from government, especially those which are located in marginal seats. While there may be a grain of truth in such narratives, the overall attitude of being ‘hard done by’ does not really assist Goulburn in the here and now. It also fails to recognise that most successful centres, whether they received special attention or not, were also assisted in their success by a great deal of effort and energy from within their own community. But perhaps the most notable thing about Goulburn’s list of barriers is the absence of any mention of education. Given the emphasis placed on education in most discussions of modern economic success, this gap seems odd.
Chapter 5: Harnessing Regional Potential – How Can Quantitative and Qualitative Perspectives Help?

The first section of this report provided a quantitative perspective on Goulburn and Orange. Like many regional cities with populations in the 20,000-40,000 range, these two places offer a range of services and business enterprises. In fact, on a range of descriptive statistical indicators, Goulburn and Orange appear very similar. In the general perception of many, however, these two cities are worlds apart and attract very different characterisations. The qualitative research confirmed the different cultures, self-image and awareness of how the rest of the world often saw them.

How then do these similarities and differences affect the realisation of a regional city’s potential? What factors drive the economic and social success of a region and what factors hold them back?

One reason why this question is so difficult to answer is there is no single way to define economic success or the appropriate pathway towards it. In many ways the pathway has to make sense within the context of the culture and values of the community. In many cases these elements are contested. What may be an obvious competitive advantage to some will not be for others. For example, the Goulburn Correctional Centre was cited as a significant contributor to the Goulburn economy through jobs and income and also because it was deemed unlikely to close down in the foreseeable future. Yet the prison was also perceived as giving the town a negative image which may lessen the willingness of people to invest in, or live in, the city. So the issue of whether Goulburn should capitalise on the fact it has the prison and the police academy, to actively promote itself as having a speciality in security-related services, is a highly contested one.

Another challenge for regional cities is that different industries will have a different type of impact on the local economy – some will bring income, others jobs, others skills or innovative practices. This report provided the example of an innovative consultancy business in Orange – while it has the potential to change the way people do business and grow their wealth, the actual business provides only two highly specialised jobs, so its impact on the welfare of the whole community may be limited.

Choosing between jobs, wealth or skills may not be possible and, like any regional city, there is a sense that anyone wanting to invest will be welcomed. However, knowing exactly what type of economic benefit different businesses might offer can be important and may enable a better balance between different economic objectives. The competitive advantage of
Goulburn’s location has made transport, logistics and storage an obvious area of focus for targeting new investment. However, such industries may not provide large numbers of jobs. The large decline in employment in the wholesale sector in Goulburn during the 2000s reflects the mechanisation of many processes within the sector. Again, determining the benefit to the town in terms of jobs, wealth creation or community skills development is important before pursuing such development, so that expectations are well-grounded in reality.

Regional areas are rightly proud of the lifestyle advantages they have over their city counterparts – less congestion, friendly community-minded residents, a relaxed atmosphere and attractive physical settings. Yet there is a potential downside in terms of the likelihood that comfort can easily become complacency. Both the retail and accommodation sector of Goulburn were reported as suffering from this. In the case of accommodation, business is going well and this was seen by some as having led to an unwillingness to change or innovate.

“We have really high accommodation occupancy here, which is great, it’s nice that we’re heavily booked a lot of the time, but I think there’s a lot of complacency there because the operators don’t need to be investing in their products and spending the money and doing refurbishments and promoting themselves, because the business just comes to them, whether they lift a finger or not.” (G6)

“There are some very nice well-kept motels, very professionally run and others which are, well, funded by super. So it’s a retirement option that seems a lifestyle more than a sharp-edged business.” (G10)

While neither Orange nor Goulburn are places where cutthroat competition is necessary for success, inattention to changing economic environments can create vulnerabilities. One anecdote provided in the Goulburn interviews may illustrate this:

“I always see this little car driving around town called the Floral Image, and I looked it up one day to find out what it was, and they do corporate flower arrangements, and all of the real estates have this Floral Image in it... Canberra-based they are, but we have five or six florists here.” (G6)

While the interviewee was highlighting the type of local opportunities available to Goulburn businesses, the fact that a competitor from out of town had taken the initiative points to a potential issue for the local economy. The florists of Goulburn have many potential markets locally as well as in Canberra – not taking advantage of these opportunities may be an active choice by businesses. A great deal of energy, promotion, market research and product development may be involved in such expansion, however not taking advantage of the opportunity has, in this case, led to a competitor from Canberra making the most of Goulburn’s local market. The loss of business to outside providers may place greater pressure on the viability of local enterprises into the future.
Two theoretical concepts are relevant to Goulburn’s locational situation. The first is the idea of ‘borrowed size’. First conceived in the early 1970s by Alonso, this concept explains the phenomenon whereby smaller centres near large urban areas often grow strongly. Phelps (2006, p. 10) defines borrowed size as:

The tendency for people and businesses to retain the advantages of being based in smaller settlements (for example, less congestion, lower rents) whilst also being able to reap the advantages on offer in larger settlements (such as access to sizeable markets, business services and expertise, larger and more diverse labour markets and cultural amenities).

With the proximity of Canberra to Goulburn, the idea of borrowing expertise or influence is particularly pertinent. The uniqueness of Canberra as the national capital provides a much deeper range of institutional, research and advocacy opportunities relative to its size. Meanwhile, the sheer size of Sydney (4.7 million people) gives Goulburn ready access to large-scale market opportunities. Orange has perhaps been more successful in borrowing size from Sydney and Canberra. This has been helped by personal networks but also by exploiting the economic opportunity to sell their lifestyle-based products.

The other relevant concept for Goulburn is that of ‘agglomeration shadows’. Whereas borrowed size highlights the benefits from being close to larger centres, agglomeration shadow acknowledges some of the challenges arising from this proximity, particularly due to the competition effects of having large centres close by (Burger et al. 2013). This tension between the positive and negative effects of relative location is evident in the views expressed by interviewees in Goulburn. It is perhaps heightened by the fact that Canberra has grown by more than 50,000 people in the past decade. But perhaps more significant is the fact that Goulburn is dealing with a change in its relative position to other centres and this change has created a level of anxiety and ambivalence about future directions. It may be that it is easier for smaller centres in the wider region, like Yass, to exploit the benefits of borrowed size whereas the larger size of Goulburn makes the competitive pressure of agglomeration shadows from Sydney and Canberra more challenging.

The influx of franchise retail operations into Goulburn has also led to angst in the community, as has the decline of some long-time businesses. The local bookstore was admired for its community involvement.

We had a beaut bookshop here for a number of years and it closed a matter of six or seven months ago... Gone! A gentleman who, he and his wife, served the community for the last umpteen years. If there was a school doing a presentation, all the schools would go and buy their books there ... and they’d give you a good deal because they wanted to help the local community. Now, they’re gone. (G1)
Nevertheless, the failure to respond to a new economic and technological reality was seen by others as a key reason for the store’s closure.

    We’ve just had a bookshop go under ... and what a no-brainer that is. Like of course, if you’re not going to be doing something different, you can’t just keep doing what it is that you’re doing. It seems like a lot of the business people here aren’t looking at what’s going on in their industry – the books for example – and saying, ‘okay, so in a couple years’ time if we keep going the way we’re going, the way that we’ve done business for the last 50 years, nobody will be coming in’. (G2)

This is not to say that business has to ignore wider community benefits. In fact, Goulburn has a great deal of potential to develop business models along social enterprise lines. Such models offer a way for Goulburn to move forward, create an innovative business environment, yet still hold to its key values around community support and wellbeing. Innovation does not have to mean becoming Sydney or Canberra, but it does mean being willing to develop and change in a way that reflects the character and values of the community. Finding a balance between competition and lifestyle is difficult. Perhaps the best way forward is simply to make sure that those favouring lifestyle are doing so in an informed way and with a view to five, 10 or 20 year outcomes and consequences.

Orange, too, has the potential to become comfortable in its success. In fact it is probably more of a challenge for a place which is experiencing a period of success to contemplate a change in fortunes. The ability of the city to address unexpected problems such as the Electrolux closure is a positive sign that the city has the flexibility to address economic change, however the tendency to gloss over, or not be fully aware of, some fairly deep-seated issues of poverty in the city may point to some potential vulnerabilities.

    I think there’s an ignorance from well-to-do and middle-income earners in Orange about the extent of disadvantage in pockets of the Orange community... People would be amazed to know that well over half of the families whose kids attend [the two CareWest] preschools in Orange don’t have a job – people would be amazed to know there’s that many people who don’t work in Bowen and Glenroi. (OR8)

In summary, the findings from the qualitative research point to some ways forward for cities seeking to maintain and enhance their economic potential:

    Make informed decisions

Lifestyle needs to be funded by economic activity. Today’s comfort may lead to tomorrow’s bankruptcy if potential threats are not considered. Choices should be informed by potential risks, vulnerabilities and consequences – for individuals and for the community. What do we want the city to be like in 30 years’ time? What do we need to do today to make sure that can be achieved?
Understand your community

Every city has its own culture, history and things that residents love. How well are these things recognised or built upon? What pathways make sense culturally? What does ‘success’ look like for this particular community: more jobs, more income, more happiness, less disadvantage? What brings the town together? What are the starting points for cooperation and connection? How are the champions and the quiet achievers celebrated?

Find common factors with other cities

All regional cities want to be successful, economically sustainable, socially and environmentally rich. The cultures may differ, the pathways may differ, but it is not a battle ground. Find common cause, practise mutual respect, learn from and support each other. Think ‘network’ rather than ‘single centre’ and see new opportunities.

The glass may actually be half full

The biggest difference between Goulburn and Orange appears to be attitude. Negative attitude not only limits potential, it can waste energy and time. What would happen if Goulburn only saw positive aspects of its location? How might it use the locational advantage of being near Canberra or Yass or Sydney? What if these places were seen as part of a friendly network rather than a threat?

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3 (a) Goulburn had the first Grand Prix. Instead of mourning its loss, how about an annual car rally over the mountains to Phillip Island in time for the current Grand Prix? Both communities can celebrate the event. (b) Orange has Banjo Paterson, Goulburn has Miles Franklin. Add Henry Lawson (born in Grenfell, schooled in Mudgee) and have a literary-historical driving tour – grab the Sydney/Canberra market. (c) Goulburn has a proud sporting history, Canberra has an Institute of Sport. What might the two communities be able to offer each other?
Chapter 6: Conclusion

Statistical indicators highlight some common factors between Goulburn and Orange – they both have relatively diverse economies and have experienced population growth. Nevertheless, qualitative analysis highlights the different characters of each city, providing insights into their strengths, barriers to realising their potential, and the ultimate potential of each city.

Goulburn and Orange have been cities in transition over the past two decades. Both have been subject to changes in the economic arena with structural adjustment playing out in the decline of agricultural employment and closure of manufacturing businesses.

Orange has emerged with a strong profile in tourism, generally aimed at a wealthier, metropolitan-based market, but utilising local advantages in wine-making and food-growing enterprises. The coordination of effort in promoting ‘Taste Orange’ has been notable. Orange also benefits from the local gold mine and the development of regional health sector facilities and the head office location of the NSW Department of Primary Industries.

Goulburn has grown slowly but steadily during the past decade which reflects a relatively strong and resilient local economy. The city is adjusting to social and economic change. The combined pressure of environmental and economic change created conflict in the late 2000s and there was fragmentation of business groups within the city. While on the one hand this fragmentation reflected and created problems – a dissipation of energies, duplication of effort and a confusion of different views of the future – it can also be viewed as having been a necessary process of creative destruction. The groups which fragmented at this stage each represented a particular perspective about Goulburn’s future: the chamber of commerce continuing a long tradition of supporting local small business; Goulburn Region Enterprise expanding the vision to encouraging investment from external sources; and The Goulburn Group highlighting the need for more sustainable forms of future development. While the council bore the brunt of much of the criticism at the time, the perceived shortcomings of that institution led to a number of people stepping forward to deal with the problems they saw. This spurring of local involvement was significant in developing better ways of dealing with economic change and structural inertia.

It is interesting to compare the willingness to discuss ‘problems’ between Orange and Goulburn. In Goulburn problems are often raised ‘loudly’ and appear to be played out in public via the local newspaper and council forums and committees. In Orange, discussion of issues appears more muted with grievances and disputes over development options usually carried out in a more controlled way and with input from professional experts. Even a recent event such as the Electrolux closure was mentioned by very few interviewees. It is difficult to reach firm conclusions from a small number of interviews, however the contrast was striking. Both positive and negative implications arise from these approaches to conflict management.
The positive approach outlined by various Orange interviewees was that of getting in and fixing problems, taking a professional approach and using experts as needed, however there was some evidence that an event like a large industry closure simply didn’t affect other parts of the Orange community.

One of the most notable differences between the two cities is the level of confidence expressed by key leaders in each city. Historically Goulburn was the key regional centre for its hinterland. Wealthy thanks to wool production, it provided a retail and social centre for a broad area. It now finds itself competing with Canberra, Yass and the coast. While many of its residents love their city, there appears to be a level of anxiety now that its place in the world is contested. This has led in many cases to an attitude of being ‘hard done by’. Other centres are seen as having had unfair favours due to their marginal electoral status or the fact they have been earmarked for particular government investments. Despite the positive aspects of Goulburn city there appears to be a lack of confidence among many of its residents and a feeling that others judge them poorly. Hence the city can present itself in contradictory ways. For example, it is ideally placed to have metropolitan connections yet most local businesses focus on local markets. Despite the friendliness of its local community being one of its greatest strengths, the levels of customer service were reported as low. And despite having a strong economic base through the prison and public services, these very activities provide a sense that the city is stigmatised. While it is true that the city contains some residents with low socioeconomic status, it is just as true that the city has a relatively low crime rate and is tolerant of difference.

Whether success builds confidence, or confidence builds success, may need to be examined further. However, in either case, there needs to be an understanding of what success should look like and this is true for any regional city. The success of Orange does not offer a pathway for Goulburn, nor does the success of Goulburn offer a pathway for Orange because, despite some statistical similarities, the two cities have different histories, cultures and geographies. Having different pathways does not mean that no lessons can be learned from each other but it may mean that the definition of ‘success’ is different in each location. Having the confidence to pursue one’s own unique potential is therefore a critical factor. Skills to achieve a community vision can be learnt and shared, but the vision itself needs to be influenced by the particular community.

It is also important to understand the consequences of both action and inaction. Encouraging new businesses to locate in a city is commonly undertaken and developing the skills to promote and attract investment is important in achieving this. Also important is understanding the type of benefit being sought – jobs, skills, wellbeing, environmental benefit, and so forth. The cost of inaction can be harder to identify in situations where business is good and profits are adequate to support a particular lifestyle. Comfortable circumstances can lead to complacency and external pressures then become a greater threat to economic viability. This is as true for Orange as it is for Goulburn.
One of the most difficult, yet important, factors in achieving regional potential is aspiration. This is partly related to the issue of comfort/lifestyle outlined above. In a situation of comfort, striving for new goals may seem superfluous and hence aspirations remain static. The issue then becomes one of potential risk: can the present lifestyle be maintained given economic realities? Another, more difficult, aspect relates to sectors of the community who may feel deprived of any aspirations. The disengagement of those who feel unable to share in economic success can result in lower educational attainment, lower potential incomes and lower employment prospects. In both Goulburn and Orange, concerns were voiced about some sections of the community who appear not to be benefiting, even where the city’s fortunes overall are quite positive. This issue is one that requires further investigation and discussion. A start has been made in Victoria with the Regional Policy Advisory Committee (RPAC) report into regional educational aspiration. Further work is needed, however, to better understand how individual aspirations and regional potential outcomes interact.
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Appendix 1: Project Informants

Goulburn
Deputy Mayor, Goulburn Mulwaree Council
Economic Development Projects Officer, Goulburn Mulwaree Council
Education and Training Consultant, TAFE Illawarra, Goulburn Campus
Executive Officer, Regional Development Australia – Southern Inland
General Manager, Goulburn Mulwaree Council
Local businessman and former Regional Operations Manager for Mission Australia in Goulburn region
Manager of District Operations – Highlands District TAFE Illawarra, Goulburn Campus
Manager Strategic Marketing, Goulburn Mulwaree Council
Mayor, Goulburn Mulwaree Council
President, Goulburn & District Chamber of Commerce
President, Goulburn Region Enterprise
Spokesperson, The Goulburn Group

Orange
Business Projects Officer, Orange City Council
CEO, CareWest
Manager, Corporate Community Relations, Orange City Council
Education, Skills and Jobs Coordinator, Central West – NSW Department of Employment
Executive Officer, CENTROC
Executive Officer, Regional Development Australia – Central West
Executive Officer, Arts OutWest Inc. Bathurst
General Manager, Orange City Council
Marketing Manager, Taste Orange
Partner, Liquidity Business Partnerships
Regional Manager, Central West Orana Business Chambers
Appendix 2: Statistical Areas Used In Data Analysis

Source: ABS digital boundaries 2011 Census
## Appendix 3: Interview Schedule

<table>
<thead>
<tr>
<th>Theme</th>
<th>Question</th>
<th>Purpose – what does it tell us about regional potential?</th>
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<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td></td>
<td></td>
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<tr>
<td><strong>Your community</strong></td>
<td>How long have you lived here?</td>
<td>Does the community have a common focus or vision?</td>
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<td></td>
<td>What attracted you to this community?</td>
<td>Is there alignment of community effort irrespective of diversity of perspectives (is diversity accepted)?</td>
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<tr>
<td></td>
<td>Has it met your expectations?</td>
<td>Coalitions? Politics?</td>
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<td></td>
<td>The community is relatively large – do you feel it pulls together as a single community or does it have clearly identifiable groups within it?</td>
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<td></td>
<td>Community aspirations (does it vary between groups or is there general alignment?)</td>
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<tr>
<td><strong>Competitive advantage</strong></td>
<td>The region’s competitive advantage, both realised and potential if better policies are in place</td>
<td></td>
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<tr>
<td><strong>The local economy</strong></td>
<td>How would you characterise the local economy – key industries, key employers, multiple small enterprises?</td>
<td>Is there a common sense of what the region’s economic advantages are?</td>
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<td></td>
<td>In economic terms, what do you see as the key assets that [city] has?</td>
<td>How well are economic processes understood?</td>
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<td></td>
<td>Are there social factors that you believe contribute to the economic success of [city]?</td>
<td>Does the perceived competitive advantages match with the competitiveness index profile?</td>
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<tr>
<td></td>
<td>Are there environmental factors that you believe contribute to the economic success of [city]?</td>
<td></td>
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<tr>
<td><strong>External markets: opportunity and risk</strong></td>
<td>The external markets that underpin a region’s economy and future opportunities (including an assessment of the level of volatility and risk for the region in key external markets)</td>
<td></td>
</tr>
<tr>
<td><strong>Markets and risks</strong></td>
<td>What are the key external markets for this city’s economy – local, regional, global?</td>
<td>The risk profile of a region’s economy and an understanding of potential opportunities or threats is important in building a resilient local economy.</td>
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<td></td>
<td>Does this present any particular risks for the local economy in terms of its reliance on particular markets or sectors?</td>
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<td></td>
<td>Are there any external markets that could be more actively pursued by businesses in [city]?</td>
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<tr>
<td></td>
<td>What do you feel are the key opportunities that can be gained through interaction with external markets?</td>
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</tbody>
</table>
| **Dealing with change** | What do you see as the key changes that this city has had to deal with over the last 1-2 decades?  
How have these changes been dealt with?  
Do you feel there is a general attitude within the community regarding change – is it welcomed or resisted? Do different groups react differently?  
Do you think that people’s attitude to change makes a difference to [city’s] development potential? | Attitudes to change can determine future development pathways. |
| **Future growth** | Do you feel that there is general consensus about the direction of or need for economic growth in [city]? Are there pro- and anti-growth elements?  
Is there a momentum occurring in [city’s] development or does it require ongoing attraction initiatives? | Alignment of growth objectives can enhance the economic potential of an area. |
| **The role of mobile resources** | The role that the arrival of new people and financial resources are playing in the region and if there are opportunities to attract new resources |
| **Flows of people and capital** | Would you say that [city] attracts people and capital?  
What are the barriers to investment in this city?  
Are there mechanisms for attracting investment to the city?  
As population increases do you feel that there is a strong economic benefit in terms of new investment or new business development?  
Is there a loss of capital, businesses or people from the city? Why? | To what degree does the city gain benefits from flows of people or capital into/out of the area? |
| **Attitudes to new ideas and new people** | In your experience, do you feel that new residents to the city are able to easily break into existing networks?  
What are the types of attitudes you might find in the town in relation to outsiders, newcomers, new ideas and change in general?  
Do you think that the experience of newcomers (i.e. feeling part of the community or not within 6-12 months) plays a role in the future potential of the town? | Attitudes to new ideas and people can affect the character and ‘feel’ of a town. They can also enable innovation and absorption of new ideas and perspectives which can have positive impacts on development potential. |
| Regional, national, international connections | Does [city] have connections with other regions — Sydney/other regional centres/overseas? How do these connections assist with development potential, if at all? Are they cooperative or competitive relationships? Do you feel the local business community is well connected with or informed about the global economy? | Connections and networks can enhance the potential of local business to tap into mobile resources and national/global markets. |
| Relations with government | Do you feel that government (local, state or federal) has been effective in supporting economic and social development in the city? Do members of the community generally have positive or negative attitudes to (or experiences of) government? Do you feel this affects the ability of [city] to grow or prosper? | Productive relationships with government through various networks can provide a strong, integrated approach to development potential. |
| Regional leadership and entrepreneurship | Characteristics of the region’s local leadership and the level of entrepreneurialism available to drive a region to mobilise its resources | |
| **Local leadership** | Are there clearly identifiable leaders in the local community? Do these tend to be residents of long standing or can anyone rise to be a leader within the community? How is leadership developed or nurtured within the community? Do community leaders work together, compete with each other or remain separate from each other? What effect do you think the pattern of local leadership in [city] has on its growth potential? | Leadership is a significant contributor to economic and social success. |
| **Information** | Information flows – what mechanisms or communication channels currently exist within the community? Do you feel these are effective or could they be improved? Within the community do you feel that most people value education and ongoing learning? What activities or events in the city reflect this, e.g. intellectual clubs, information forums, creative arts, informal and formal learning networks? | Access to and use of information is critical in modern economies. |
| Technology | In what ways has technology been used or developed in the community? Connecting the community? Creative arts? Modernisation of existing industries? Education? Teleworking? Telehealth? Reducing issues of isolation? Would you say that the community welcomes technology – is it seen as an opportunity or threat? | Access to and use of technology is critical in modern economies. |
| Local organisations | What is the role for local business groups like the chamber of commerce, peak bodies or other interest groups? How effective do you feel these are within [city]? Are there too many interest groups – is this a problem or asset? How connected are local leaders to the outside world – how often do local business people attend conferences, trade shows (nationally or internationally)? How is the information from such events shared with others in the community? Is there public involvement or engagement with decision-making processes? | Business groups and similar bodies can support and nurture leaders and can act as important information providers. |
| Dealing with conflict | Are you aware of any divisions or differences between groups in this community? Where there are differences are there ways that the community can air or debate them? Is there a forum for such discussions? Do you think that conflicts or divisions in the community are detrimental to the future development of the town, or are they a source of ideas and new perspectives? | How conflict is dealt with can determine future development pathways – will energy be divided and fractured or will it come together in innovative ways? Will parts of the community be left behind while others prosper? |
| Conclusion | Can you name: Three underutilised opportunities in [city]? Three barriers or challenges to overcome? Three words to sum up [city’s] potential? | Will be interesting to see if the same answers come up or if there are a variety – may point the way to possible policy focus/may highlight hidden advantages that have remained underutilised. |