

Engaging the Productive Ageing: Enhancing Regional and University Viability, and Senior Health through an Enterprising Ageing Population

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Abstract

This paper describes an emerging new project area that engages the enterprising capacity of an active ageing population to achieve a range of personal, institutional, regional and national objectives through processes of learning and innovation. The Sunshine Coast and Wide Bay regions of Queensland are taken as case studies for the project as they typically reflect the growing regionalisation of a rapidly ageing population currently occurring in Australia. The universities located within the regions are taken as a facilitative agent for the learning and innovation framework for the realisation of the currently underutilised enterprising capabilities of the ageing population.

Keywords

Seniors, engagement, regions, universities, innovation

Introduction

This paper describes an emerging project area that engages the enterprising capacity of an active ageing population to achieve a range of personal, institutional, regional and national objectives through processes of learning and innovation. The Sunshine Coast and Wide Bay regions of Queensland are taken as case studies for the project as they typically reflect the growing regionalisation of a rapidly ageing population currently occurring in Australia. The universities located within the regions are taken as a facilitative agent for learning and innovation within a regional engagement framework with the objective of realising current enterprising capabilities of the senior-aged human capital..

There are a number of direct policy and practice drivers for the project. They are:

- How to boost the viability of regional communities impacted on by high in-migration flows of senior aged Australians, but with poor socio-economic performance. Typically called 'lifestyle' regions they are outlaying increasing infrastructure and service support for an ageing population while at the same time having an apparent reduced capacity to accrue a commensurate revenue stream through this rising demographic.

- How to enhance the health and well-being outcomes of active seniors in ways that recognise their knowledge and expertise in practical and meaningful ways and to build a stronger sense of personal gain through community engagement
- How to strengthen the viability and competitiveness of non-metropolitan regionalised universities through teaching, research and innovation initiatives that engage with knowledgeable active seniors, institutions, and the regional community in which they are located.

Literature themes

The 2003 *State of the Regions Report* (ALGA 2003) presented a demographic profile for so-called retirement-oriented 'lifestyle' regions as typically being in the lower end of socio-economic performance in terms of employment and income growth, with significant rates of population growth in older ages, rapidly rising housing prices and heavy demand for infrastructure and community services. Local authority budgets are being particularly impacted on by these demographic shifts.

The *State of the Regions* report highlights that "...the proportion of population of retirement age (55-69) was particularly high in the currently fashionable retirement (and grey nomad) areas: Wide Bay Burnett, the Sunshine Coast and the NSW Mid North Coast" (p. 4.36). These trends are confirmed in other demographic analysis such as that carried out by Salt in his *The Big Shift* report. The *State of the Regions* (2003) report also notes the significance of senior migration on regional viability and local government capacity to provide infrastructure and human services, particularly with cost-shifting to local government from the other spheres of government, saying "Governments that do not have strong population growth in the under 55 age group are most seriously impacted in terms of their resourcing capacity" (p. 4.59). Typically such regions find there is a net outflow of population in the 19 to 54 age group.

Interestingly, however the only solution offered in the *State of the Regions* report is one that relates to adjusting the Financial Assistance Grants formula to take into account the impact of an ageing population at the local government level. In this project we offer another strategy that seeks to build underlying economic capacity on the back of the expertise of seniors within a framework of innovation, learning, enterprising and engagement. In other words we argue these retirees have an increasing potential economic worth of an enterprising kind separate to their declining economic worth as local consumers and local investors.

Recognising the significance for local government capacity of an ageing population in some regional areas, the ALGA issued a population ageing action plan (ALGA 2004) that specified

principles and objectives to help local councils plan for an ageing population. The action plan followed an earlier ALGA discussion paper *An Older Australia: Identifying Areas for Local Government Action*.

The ALGA action plan specified four priority areas, and a number of strategies, including building awareness of the ageing population issue in local government, encouraging local government planning action, fostering partnerships to support a collaborative approach to population ageing, and improved access to regional information on population change. We believe this project provides a strategy to achieve this action plan.

More broadly in relation to the ageing population, both the federal government and the Queensland Government have issued policy and strategic planning statements that focus on the health and well-being aspects of seniors, including for the 'active' seniors group which are the target group for this project. The commonwealth government's *National Strategy for an Ageing Australia: An older Australia challenges and opportunities for all* (2001) talks about opportunities for Australians to make a lifelong contribution to society and the economy, including through training and professional development and lifelong learning for mature age workers and learners. (p. 2). The Strategy says that for Australia to "...achieve sustained economic growth, there will have to be a continuation of current productivity growth and better utilization of the skills and experiences of mature age workers" (p. 17).

At a state level, the Queensland Department of Community Services issued a 1999 policy document, *Our Shared Future: Queensland Framework for Ageing 2000–2004*, which specifies five principles and strategies that seek to improve a coordinated approach to the design and provision of aged services. Importantly for this project, the policy paper recognises the contribution seniors can make, through knowledge and learning, to society, culture and the economy of their communities. This was also recognised in the Queensland Department of Families report *Ageing: Myth and Reality* (p. 19). However, this contribution is generally seen in terms of voluntary assistance in the community, as unpaid help and assistance with families.

Similarly, in 2003 the Queensland Department of Families released a discussion paper *Queensland 2020: A State for all Ages*, which discusses wellbeing, social cohesion, intergenerational equity and sustainability principles.

However, what we are concerned with in this project is not to see active seniors as a 'free good', but something more fundamental that produces enterprising outcomes that are based on knowledge and expertise within a stimulating innovative learning environment. This is consistent

with the report's finding that "...Mature age workers have been shown to have experience, a great deal of practical as well as theoretical knowledge..." (p. 33).

The policy agenda of non-government representative organisations like National Seniors reflects input from its broad membership <<http://www.cota.org.au/Policy2005.pdf>> and covers health, housing, employment, education, travel, information, taxation, legal matters, safety, and volunteers. The present project is consistent with these policies as they relate to employment and education.

However, none of these policy documents spell out a spatial policy perspective, even though there are quite clear spatial differences in impact as the *State of the Regions* (2003) report and Salt (2003) have demonstrated. Nor do these policy and strategy documents identify how the health and wellbeing of this active demographic, and the communities in which they reside, can be enhanced through meaningful enterprising initiatives that draw on the accumulated knowledge and expertise of these people and the learning and research frameworks of education institutions.

The second area of literature important for this project concerns the growth and competitiveness of Australian regions, and in particular those regions that are at the forefront of 'lifestyle-seeking' senior in-migration population growth. While competitiveness and equity are the two principles that are meant to underpin policies relating to regions, the strategies and programs put forward to address them are generally vague in the way these objectives will be met. They tend to rely on a range of 'off-the-shelf popular approaches (such as social capital, learning regions, aggregate demand, 'institutional thickness', industry clustering, etc.) that are unsubstantiated in their evidence.¹

Research suggests there has been an increasing concentration and divergence in growth between metropolitan and non metropolitan regions in Australia over the past two decades that indicate many of the supposed drivers for regional growth, explicit in the institutional

¹ For some of the main literature proposing these embedded institutional concepts of regional development theory, refer to the following. For the concept of 'social capital' see Putnam (1993, 2000), World Bank (2002) and Bowles and Gintis (2002). For 'institutional thickness' refer to Amin and Thrift (1994), Amin (1999). For literature on 'business clustering' refer to Porter (1990 and 1998), Porter and Kretz (2003), Storper (1997), Cooke (1998). For literature on 'learning regions' refer to Lundvall and Johnson (1994), Ashiem (1997), Storper (1997), Maskell and Malmberg (1999), and Florida (1995 and 2002), Cooke and Morgan (1998), and Cooke (2002). For literature on regional innovation systems refer to Braczyk et al. (1998). For some of the main literature seriously questioning the institutionally embedded concepts of regional development theory, refer to the following. For 'social capital' refer to Durlauf (2002), and Woolcock (1998). For 'institutional thickness' refer to MacLeod (1997), Eraydin (2002), Wolneberg (2002), Raco (1998), and for literature on business clusters see Taylor (2005).

embeddedness approach to regional development theory, policy and practice, are either ineffective or have negative impacts (Plummer and Taylor 2001, Garlick and Waterman 2005).

From the analysis, human capital, access to high technology, and industry specialisation are seen as the main positive drivers.

The analysis suggests an approach to regional growth and competitiveness that focuses on the growth transmission process, and in particular on the degree to which it can engage with the enterprising aspects of a region's human capital (Garlick and Waterman 2005) is the best way forward. The regional analysis, covering 94 Australian regions, includes five sub-regions targeted for the case study analysis for the Sunshine Coast and Wide Bay regions for this project. They include Caloundra, Maroochydoore, Gympie, Hervey Bay and Maryborough.

The third area of literature relevant to this project relates to the increasing pressure on universities, and in particular regionalised universities, to be competitive and viable in an international sense. The recent higher education issues paper, *Building University Diversity: Future approval and accreditation processes for Australian higher education* (Nelson 2005), discusses matters associated with accrediting protocols to ensure diversity, and consequent competitiveness, in teaching, scholarship and research among Australian universities. The paper follows the recommendations of the Guthrie review

http://dest.gov.au/highered/pubs/nat_protocols_approval/higher_education.htm in 2004, which found that accrediting protocols limited diversity. The issues paper states "...alternative approach may be to allow greater higher education flexibility in combining the elements of teaching, scholarship and research provided the applicant institution meets more appropriate criteria of quality and outcomes, possibly through national or international benchmarking" (p. 20).

Relevant to this ongoing discussion of university diversity and viability and the existing spatiality of university campuses is the Commonwealth Government's higher education white paper, *Universities at the Crossroads: A Review of Higher Education* (Nelson 2003). Of particular interest is its concern with building stronger partnership links between universities and their communities, particularly those in non-metropolitan areas.

There are now more than 160 university campuses in Australia and many more university teaching and learning access centres. About one-third of these campuses are located in non-metropolitan areas. Much of this rapid regionalisation of universities has come about over the past two decades on the back of false efficiency and equity policy arguments and there is now a need for new strategies that better connect these universities with the regional communities in

which they deliver their services (Garlick 1998, 2000, 2002, 2003; Garlick and Pryor 2002; Stevenson et al. 1999, 2001).

This connection between space and the higher education system, and the increasing need for new ways to boost competitiveness, diversity, enhanced institutional viability, and reduced inequity within and between metropolitan and non-metropolitan areas has led to a growth in interest in forming meaningful and mutual partnerships between universities and the regional communities in which they have an interest in. Spurred on by the recognised benefits of knowledge creation and distribution in a global environment of rapid change, institutional managers, regional community practitioners and leaders, researchers, educators and policy developers have over the last seven or eight years been facilitating the formation of new partnerships built around location.² It is not a 'third way' or 'add-on' in the way that some universities have previously seen their community service obligations as additional to teaching and research — it connotes the academy and regional society as a whole. For universities, it is a way of designing and delivering their teaching, learning and research in a way that has relevance to the communities in which they reside. For communities, it is seeing how their active and creative human capital can be put to enterprising and productive purposes right across the economic, social, cultural and environmental spectrum.

For the university, regional community engagement represents an additional strategy by which they can draw on a much wider range of regional attributes (human capital, infrastructure, leadership, social capital, etc.) in pursuing their viability options. For the regional community trying to remain competitive and viable in an increasingly idea-dependent world, it provides a much underutilised asset that is right on their doorstep. For government, trying to maintain a viable and accessible higher education system as well as some balance in the way the spatial economy develops, facilitating such engagement arrangements between HEI's and their regional communities must make just good sense.

² There is much more interest in building university and community partnerships today than there was six to eight years ago. A number of universities have changed their strategic plans and missions to reflect the need to strengthen these connections. Some universities have appointed senior people to take on responsibility for building these relationships. There are now many more case study examples of 'good practice' engagement occurring across a spectrum of social, cultural and environmental dimensions. Conferences, such as the *Insideout* conference in Queensland held every two years and the annual regional engagement forum organised by the newly formed Australian Universities Community Engagement Alliance (AUCEA) of networked universities, show an increasing interest in this area.

Spatial demographic context

The Sunshine Coast and Wide Bay regions, as case studies in the present project, are characterised by:

- rapid population growth, part fuelled by in-migration of 'life-style seeking' seniors. The Sunshine Coast and the Wide Bay regions both have 28 per cent of their population in the 55 years and older category compared to a national figure of 21 per cent
- a relatively low socio-economic performance (unemployment, employment growth, income levels) that reflects the ageing end of the demographic structure as well as industry restructuring. The *State of the Regions* (2003) report ranks indicators of these measures for the two case study regions at between 40 and 50 out of the total of 64 metropolitan and non-metropolitan regions Australia-wide. This situation is similar in other 'lifestyle' regions
- a relatively high level of 'creative skills', as measured by the creativity index in the *State of the Regions* report, 2002. The 2002 *State of the Regions* report for example gives a creativity index ranking for the Sunshine Coast region of 15, just in front of another 'lifestyle region' in the Richmond Tweed region of New South Wales, and only just behind regions in Melbourne, Sydney, Brisbane and Adelaide.
- a high level of latent social capital of an enterprising kind that is inherent in the educational and professional attainments and experience of the seniors in the population.

These characteristics are becoming increasingly common to many other 'lifestyle' regions throughout Australia where the current realised productive contribution of active seniors falls short of their impact on community services and infrastructure.

Regional growth and competitiveness

Analysis of regional growth and competitiveness over the period 1984 to 2002 (Plummer and Taylor 2001; Garlick and Waterman 2005) for 94 Australian regions identifies the circumstances for the five sub-regions in the study area for this project. Table 1 shows the rank order out of 94 regions for relative growth and for the presence of the three key drivers for positive regional growth and competitiveness (human capital, specialisation and access to high technology) and for the negative driver, institutional support.

The data show that the sub-regions in the project study area have some of the lowest rankings for economic growth. The presence of the key human capital driver is very poor, while the access to high technology driver is also relatively poor. Industry specialisation is relatively good for the Sunshine Coast and for Hervey Bay, while the regions rank at around the middle for the degree of institutional intervention, with the Sunshine Coast and Hervey Bay doing better against this driver. This points to a situation where a failure to engage the region's human capital shows up in poor

economic growth. Any strategy for regional development in these places therefore should focus on the way human capital is engaged in the growth transmission process.

Table 1. Regional growth and competitiveness ranking*

	Relative growth 1984–2002	Relative growth 2002	Access to high technology	Human capital	Industry specialisation	Institutional support
Caloundra	48	87	32	86	13	46
Maroochydoore	43	88	38	88	13	25
Gympie	24	90	56	89	61	42
Hervey Bay	57	93	72	94	21	16
Maryborough	14	81	39	76	57	46

* Out of 94 regions Australia-wide

Source: Garlick and Waterman (2005)

Regional development transmission

Two regional development transmission concepts stand out from the research work on regional growth and competitiveness (Plummer and Taylor 2001; Garlick). These concepts are:

- (a) enterprising human capital
- (b) regional engagement.

'Enterprising' people in the regional development context we define as those that take an idea and turn it into an outcome using the regional attributes at their disposal. They are people that understand the way markets operate, can access finance, can see an opportunity, understand risk management, without necessarily being risk-takers, and can mobilise resources, particularly teams, to good effect. They are ostensibly outcome-oriented people, and they are an undeveloped resource that exists across demographic groups in most communities. Developing an enterprising culture in the regional context is seen as something that needs to be taken on by the education system — not the training system — as it is about behavioural processes of thinking and acting that have long run implications.

Regional engagement in this context we refer to as the mutual and creative connectivity that can be formed by the region's human capital, to achieve accumulated outcomes that otherwise might not be possible when attributes are taken in isolation or are constrained by business or institutional structures. It is, in a sense, a framework of mutual cooperation that surrounds the enterprising human capital in the region. It is a concept of regional *involvement*, where participants are accepted on equal terms to exchange knowledge as learners.

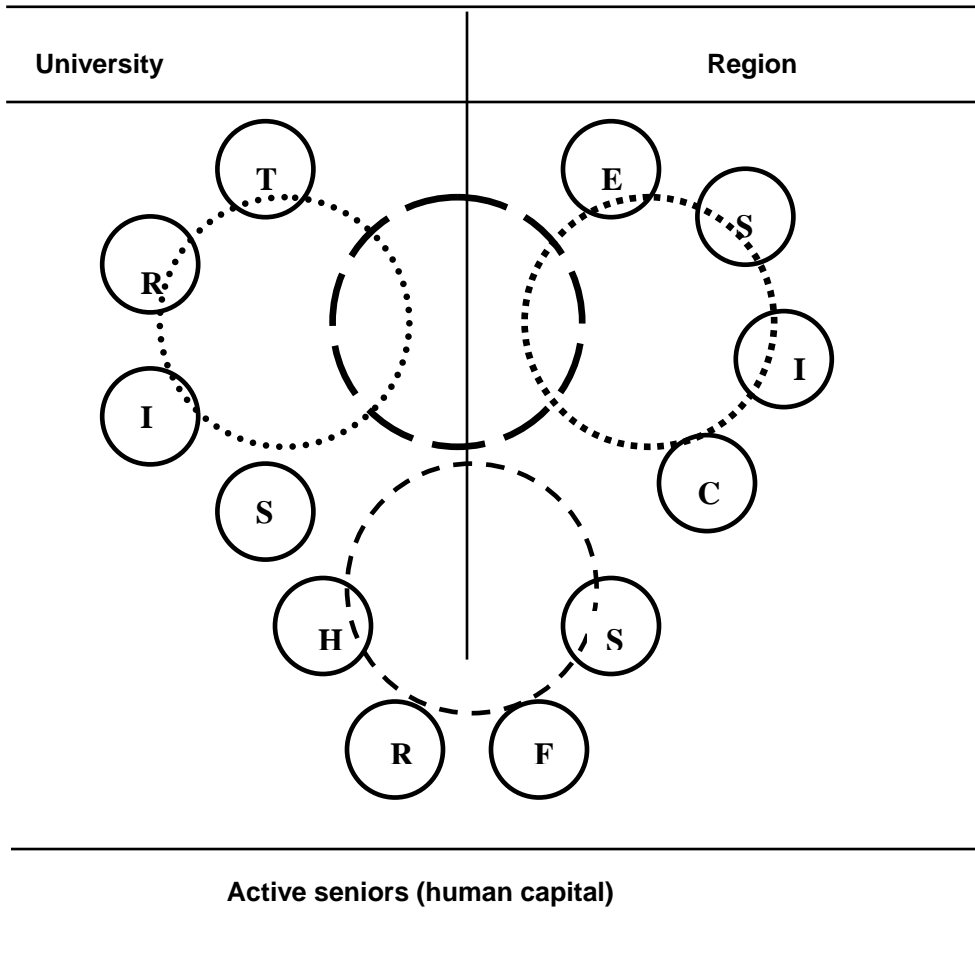
University engagement

At the regional scale, universities can enhance the human capital and viability of the communities in which they are located through their teaching and learning, research, and leadership in various ways. They can:

- tailor and target teaching and learning programs to areas of identified regional skill need and build-in course elements so as to facilitate an enterprising culture among those undertaking the learning. There are a number of universities that now tailor their programs to the specific institutional and corporate needs of the region. There are few programs in universities however that aim to facilitate the enterprising abilities of graduates and undergraduates, to enable them to apply their ideas in the local region to bring about change.
- design undergraduate access requirements that equate with the region's socio-economic circumstances. There are a number of examples of universities where this already occurs.
- design courses that are delivered in a flexible way so as to respond to the changing demographic and other circumstances of the region
- introduce initiatives such as business incubators, practicums, scholarships, awareness raising programs, and other means to maximise undergraduate attendance and graduate retention in the region
- targeted local research in partnership with local community groups
- the university may contribute social capital in the community through its leadership and strategic focus, its marketing and promotion, and infrastructure provision. In a few cases this contribution goes beyond simple civic capital into enterprising action to get things done locally.

A model of university/region/active seniors engagement

As Figure 1 below shows, the challenge for the project is to integrate the attributes and requirements of the university, the regional community and the active seniors as the target human capital group in ways that involve and impact on labour market, innovation, social, cultural and the environmental requirements of the local region; the teaching, research, infrastructure and community activities of the university; and the health, financial security, recognition and social inclusiveness of seniors. The challenge is to recognise and value the potential significance of their human capital, and the creative and enterprising outcomes it can bring through knowledge and learning, and to work in partnership with the university and the regional community in a way that can bring mutual benefit.



T = teaching and access to regional Students; **R** = research specialisation & training; **I** = Infrastructure and resource efficiency; **S** = Community service access and social capital
H = an active healthy life
F = financial security
S = Social interaction

S = Skills and regional labour market;
E = Environment sustainability;
I = regional innovation;
C = Community culture, health and social wellbeing
R = Recognition for community contribution and for expertise and knowledge

Value added university management
 Value added regional management
 Value added active senior involvement - - - - -
 University/ region/ seniors interface - - - - -

Figure 1. Value adding through the university/region/active seniors interface

Essential elements of project

In implementing this model, the project will encompass the following nine broad streams of activity:

- a. ***Harnessing the ideas, creativity, enterprising skill, knowledge and experience of the regions' seniors.*** A knowledge audit of seniors will not only form an electronic directory for regional access, but importantly will be the basis for dialogue to identify complementary and reinforcing ideas that can be progressed through processes of learning, innovation and enterprising action in collaboration with the two universities and other groups both inside and outside the Sunshine Coast and Wide Bay regions.
- b. ***Identifying the regions' priority directions to ensure a viable community into the next 50 years based on learning and knowledge creation and exchange.*** The universities will facilitate dialogue with key groups, including enterprising seniors and business, across a broad spectrum in the community to identify agreed long-term directions and highlight ventures where collaborative partnerships can be made between higher education research, teaching and learning, regional stakeholder groups, the knowledge and contribution of the regions' seniors, and outside funding bodies (grants, equity investment, etc). These coalitions of focused interest and expertise will evolve across the economic, social, cultural and environmental spectrum as the ideas take on an enterprising dimension.
- c. ***Idea incubation and enterprising processes.*** The University of the Sunshine Coast Innovation Centre and business incubator will be a focus for this phase of the project. The project will build on the Centre's screening process for identifying ventures worth providing incubator and investment support to, and will also include non-business enterprising ventures of benefit regionally across the social, cultural and environmental spectrum. The Innovation Centre, established in 2001, has a number of start-up companies in residence and a relationship with a \$20m pooled development fund to seed start-up, early expansion and later stage business expansion.
- d. ***Supported learning framework.*** The project will encourage changes in the design and delivery of university teaching, learning and research programs to better support the enterprising initiatives being pursued by active seniors in association with other agents and agencies.
- e. ***Input to institutional policy and practice.*** Experience from the project will input into government and institutional policy, practice, and service provision and program delivery to enhance seniors', regional community, and university outcomes.
- f. ***A greater contribution of seniors to professional and practical knowledge.*** This will occur through expertise download and hands-on transfer of skills to others, for personal and community gain.

- g. **Benchmarking for improvement.** An effective self-assessment measurement regime will be put in place to enable regular processes of improvement in the various aspects of the project from the perspective of institutions and seniors. The regime will be based around principles of collaboration, learning, and review.
- h. **Disseminating 'good practice'.** The project will have a number of benefits for seniors in other communities as well as other universities and their regional communities wanting to develop a meaningful and purposeful partnership with the active and productive ageing. This phase will include:
- a report detailing methodology, impediments, opportunities, processes, and results achieved that will provide confidence for other regional communities and their universities, where there is an underutilisation of the capabilities of seniors, to embark on their own enterprising engagement initiatives.
 - a self-assessment benchmarking manual for use by universities in partnership with their communities.
 - a national conference, website and various local media reports on a regular basis, academic conferences (health and ageing, regional development, industry development, university development, etc).
- i. **Research training.** The project will comprise a stream of research topics (see diagram) that will provide a range of research training opportunities through the two universities involved in the project.

Implementation

Each topic to be covered either on a regional basis or in terms of the key thrusts of the study (i.e. regional growth dimension, active seniors dimension, university viability dimension) will be a field of inquiry and action. Each will include a number of questions or issues, determined through the stakeholder consultation phase of the project (phase one).

The bolded arrows in Figure 2 show the ways in which results of the research can be synthesised and integrated to develop a diverse range of products. There will also be a number of interlinked topics, such as:

- the *inter-regional* comparisons in relation to regional growth and development, the active and productive ageing, and the engagement by the university
- the *intra-regional* comparisons in relation to connections between regional growth and competitiveness, the role of the active and productive ageing, and the role of university in the engagement processes.

The study team anticipates that the key products to be derived from the project will include the following:

- Enterprising outcomes in each region, such as new business start-ups, social, cultural and environmental initiatives
- New knowledge in the form of published academic research papers, completed higher degrees and associated publications and other formal and publications of community benefit and interest
- Personal benefits for the active and productive seniors, such as new learning, new interests, new business and other enterprising associations as well as health benefits from a sense of community contribution
- Education products in the form of, for example, new teaching and learning and research programs, partnerships, services, infrastructure.

Thrust of the Study	Sunshine Coast Region	Wide Bay Region
Regional growth dimension	Topic SR1 Topic SR2 Topic SR3	Topic WBR1 Topic WBR2 Topic WBR3
Active seniors dimension	Topic SPA1 Topic SPA2 Topic SPA3	Topic WBPA1 Topic WBPA2 Topic WBPA3
University viability dimension	Topic SU1 Topic SU2 Topic SU3	Topic WBU1 Topic WBU2 Topic WBU3

SR = Sunshine Coast Region growth issues
WBR = Wide Bay Region growth issues
SAS = Sunshine Coast Region active seniors issues
WBAS = Wide Bay Region active seniors issues
SU = Sunshine Coast region university engagement issues
WBU = Wide Bay Region university engagement issues.

Figure 2. Schematic overview of the study design

Potential project partners

The study teams have approached a wide range of potential public, institutional and private sector partners for the project, including:

- government (federal, state and local)
- local government associations
- industry (small business associations, finance industry)
- regional development organisations
- universities
- seniors groups
- service groups
- health organisations.

Conclusions

This project offers an approach to engaging active seniors as a key human resource in the growth prospects of those regions currently attracting increasing numbers of so-called lifestyle-seeking retirees. It is an approach based on realising the enterprising capabilities of this demographic within a framework of learning and innovation using the university as a facilitating agent.

In this regard it goes beyond many current strategies that see active seniors as employees or as unpaid and charitable help in the community and provides an important strategy to assist in local, state and federal government strategies to address a number of economic, social and cultural issues associated with an ageing Australia. The approach also offers an additional strategy to boost regional development outcomes, rather than simply view older age population growth as an additional cost that needs to be compensated for. Finally, it offers a strategy for university viability in such locations.

As the project unfolds through the practical demonstration of the case studies in the regions and the associated research that is carried out, we expect there will be contributions to theory, policy and practice in relation to the role of engaging enterprising and innovative initiative as a mechanism for mobilising current underutilised senior aged human capital to boost personal, local, regional and national outcomes.

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