



The Training and Skills Commission

Interim Report on **South Australia's
Industry Priority Qualifications**

December 2015



Government of South Australia
Training and Skills Commission



www.tasc.sa.gov.au

Better Skills
Better Work
Better State

Foreword



The Commission is excited to present this Interim Report on South Australia's Industry Priority Qualifications. This unique report details the unprecedented industry collaboration and extensive consultation process undertaken by the Commission over the last nine months. The overwhelming response has culminated, for the first time, in the identification of industry's priorities across the State economy. Engagement with industry stakeholders has exceeded the Commission's expectations and the results and analysis of this work will be important for years to come.

These identified priority qualifications lists are a direct reflection of industry feedback and will comprise an important part of the range of inputs used by Government to determine the level of public subsidy for vocational education and training qualifications.

On behalf of the Commission, we extend a sincere thank you to all contributors and respondents who were involved in our consultation on Industry Priority Qualifications. It is clear that the challenges facing skills development for industry are significant, but so is the appetite from Government, industry and the community to actively pursue answers.

This is an Interim Report of the work conducted by the Commission to date and will be available for comment and additional input from stakeholders prior to the release of the Final Report in March, 2016. We encourage businesses, training organisations, representative bodies, trade unions and employer associations to consider the findings and continue to engage with the Commission on your priorities and future workforce needs.

It is completely understandable and defensible that the priorities of Government and public investment may differ from those of industry. It is the Commission's hope that any divergence will not be significant. We are encouraged by the fact that this is the first time the Government will have a comprehensive understanding, informed directly by industry, of the needs of industry within the context of qualification and skills priorities.

South Australia needs a workforce that is innovative and adaptable but most importantly, in possession of the skills required to meet the ever-changing needs of industry and the South Australian economy. This Interim Report is a valuable tool in meeting that challenge.



Adrian Smith
CHAIR



Anthony Kittel
DEPUTY CHAIR

Our Members

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The Training and Skills Commission

Comprised of industry, academic and community leaders, the Commission, established in 2003 and later reformed in 2008, has responsibilities in advising the Minister for Employment, Higher Education and Skills on skills and workforce development priorities for South Australia and in regulating our Apprenticeship and Traineeship system.

The Commission also provides independent, strategic advice on how South Australia can invest in a sustainable, highly skilled workforce, particularly in key growth sectors. This advice is crucial to meeting South Australia's economic and social needs, now and into the future.

Our Responsibilities

The Commission's responsibilities include:

- Promoting and encouraging investment, equity and participation in, and access to VET,
- Monitoring, reporting and making recommendations to the Minister on the State of VET and workforce development in South Australia, including the expenditure of public money in these areas and
- Promoting pathways between the secondary school, VET, adult community education, and higher education sectors.

Executive Summary

This Interim Report represents the significant findings of the Commission's Industry Priority Qualifications Survey and consultations. With 1138 Qualifications, Skill Sets and Accredited Courses (QSCs) identified by industry as a priority, this report provides a unique opportunity for the State Government to strategically align its investment in skills development with the qualification priorities of industry.

Informed by 850 responses to an industry designed Survey, 20 half-day consultation sessions and discussion with peak employer and employee bodies - representing over 700 hours of consultation activity, the 'Whole of Economy' list of Priority Qualifications is arguably the most comprehensive exploration of industry demand conducted in any jurisdiction in Australia.

Across the breadth of our State's economy there are 105 QSCs identified as Highest Priority (Tier 1), 146 identified as a High Priority (Tier 2), 224 identified as a Priority (Tier 3), 663 identified as a Low Priority (Tier 4) and 2994 were not prioritised (Tier 5).

As diverse as enterprises are within our State, the results of the Survey indicate the wide application of generic and transferable qualifications across most industry sectors. Of the 105 qualifications identified as Highest Priority (Tier 1), approximately 50 percent are highly transferable and non-industry specific. Leadership and management, general business related qualifications as well as work, health and safety qualifications were routinely identified as a high priority across most industry sectors.

These results are complemented by qualitative insights gathered from extensive conversations with our Industry Partners, which in turn has enabled the identification of key trends and workforce development challenges in South Australia. These include:

- The increasing complexity of the VET Sector is proving difficult to understand and navigate,
- Formal training is not always the answer to the workforce development needs of industry,
- Enterprises highly value skills that increase employees internal mobility and capabilities,
- The Australian Qualifications Framework (AQF) and Training Packages are inconsistent and often misunderstood by many engaged in the VET system,
- Continual changes to the level of public subsidy for VET qualifications diminishes business planning capability and
- The capacity of industry to invest in skills development varies widely between sectors and sub-sectors.

Throughout the process of consultation the Commission has remained committed to its principles of transparency with its approach and methodology.

The Commission is convinced that the Priority Qualifications for the whole economy represent a solid platform to guide Government investment in vocational education and training. These qualifications have been self-identified by industry and considered in the context of the wider economy.

It is not always the case that VET qualifications are undertaken for the purposes of vocational employment or improving business productivity. It is therefore important to understand the role that VET plays in our society in the broader context. The Commission has long provided support and analysis on the social inclusion role of the sector, including the critical role that the Adult Community Education (ACE) sector plays in providing pathways that encourage participation in work and society.

The Commission intends to provide further comments and advice on how the South Australian Government may maximise the use of these results in its final report that is due to be released in March 2016.

KEY INSIGHTS

	Respondents	850 respondents completed the IPQ Survey representing employers, individuals, unions, registered training organisations and industry groups.
	Employer Size	58% of employers surveyed identified as micro or small businesses with less than 20 employees.
	Qualifications	Over 1100 Qualifications, Skill Sets and Accredited Courses (QSCs) were identified by industry as a priority. This is just over 25% of all available QSCs (4103) embedded within the Survey.
	Priorities	105 qualifications were identified as a ' Highest Priority ' for industry over the next five years, while 146 were identified as a 'High Priority' and 224 identified as a 'Priority'. The remaining 663 were identified as 'Low Priority'.
	Top Qualifications	Generic (business-related) qualifications were consistently identified as high priorities for industry and the SA economy. These qualifications were often considered applicable to multiple occupations and transferable across industry sectors.
	Skills Clusters	Managerial and Leadership, Sales and Customer Service and Information and Technology skills were ranked most highly across industry sectors by survey respondents as the skills required in the next five years.
	Key Challenges	Reskilling will be a priority to meet the skills and workforce needs of the future as structural change presents ongoing challenges for the South Australian economy.
	Projected Employment Growth	TaSC Interim Modelling projects Employment growth of 1.1 percent per annum (43,000 new jobs) over the next five-year period.

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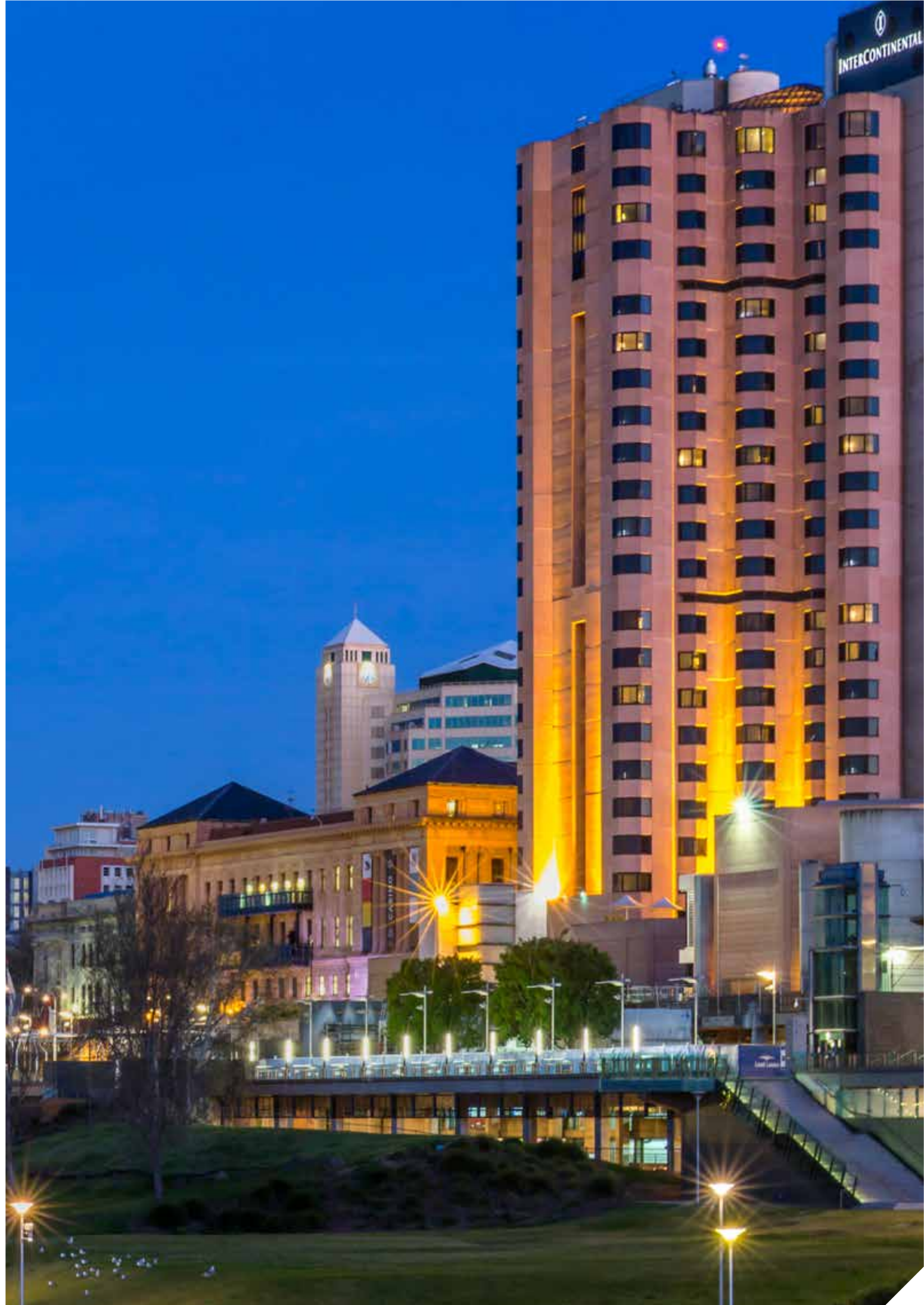
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OVERVIEW

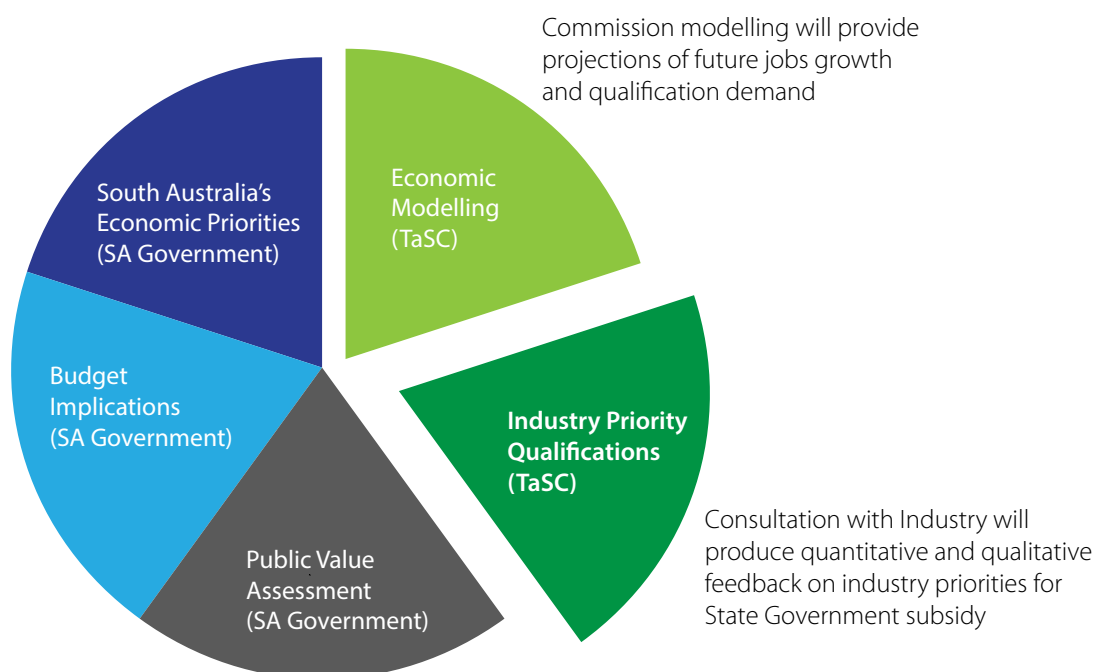
1.1 Minister's Request

Early in 2015, the Hon Gail Gago MLC, Minister for Employment, Higher Education and Skills requested, in accordance with the Training and Skills Development Act (2008), that the Training and Skills Commission seek feedback from stakeholders to identify the Priority Qualifications across industry sectors. The outcomes of this consultation are intended to guide future State Government investment in training and skills development.

The Commission's industry advice will be one of five inputs used in the State Government's process to inform future iterations of the Subsidised Training List (STL). Other factors of the Government's decision-making matrix that will inform the STL include:

- The Commission's independent economic modelling of demand for qualifications and job openings,
- A Department of State Development Public Value assessment,
- Budget Implications and
- South Australia's Strategic Priorities.

Figure 1 - The Five Inputs to the Subsidised Training List (STL)



1.2 Policy Context

In April 2015 the South Australian Government released *Work Ready* - a repositioned training, skills and employment policy aimed at redirecting Government's investment to areas of greatest public benefit and strategic importance to the State's economy.

The announcement advised that the current Subsidised Training List (STL) - formerly branded as the Funded Training List (FTL) - would be reduced from 900 publicly subsidised qualifications to around 700 qualifications on 1 May 2015. It is expected that over the coming years, the number of qualifications that receive a State Government subsidy will decrease again as the STL is aligned to the needs of industry in order to target areas with the greatest social and economic benefit.

There is currently over \$300 million of taxpayer funds used to subsidise VET in South Australia. However, as less public funding flows through the South Australian VET sector over coming years, impacts on training activity can be ameliorated through better targeted alignment of training places to strategic industry need.

In the transition from *Skills for All* to *WorkReady*, there is less flexibility in the State Government's investment in training and skills development. However, the Government has advised that over time when the pipeline of students under the *Skills for All* entitlement complete training

activity, there will be funding available to accommodate new industry priorities.

The Commission subscribes to the notion that for training activity to be sustainable it must be better targeted to strategic industry need over the longer term and an appropriate balance must be achieved between government, individual and industry investment in training and skills development.

1.3 Economic Outlook

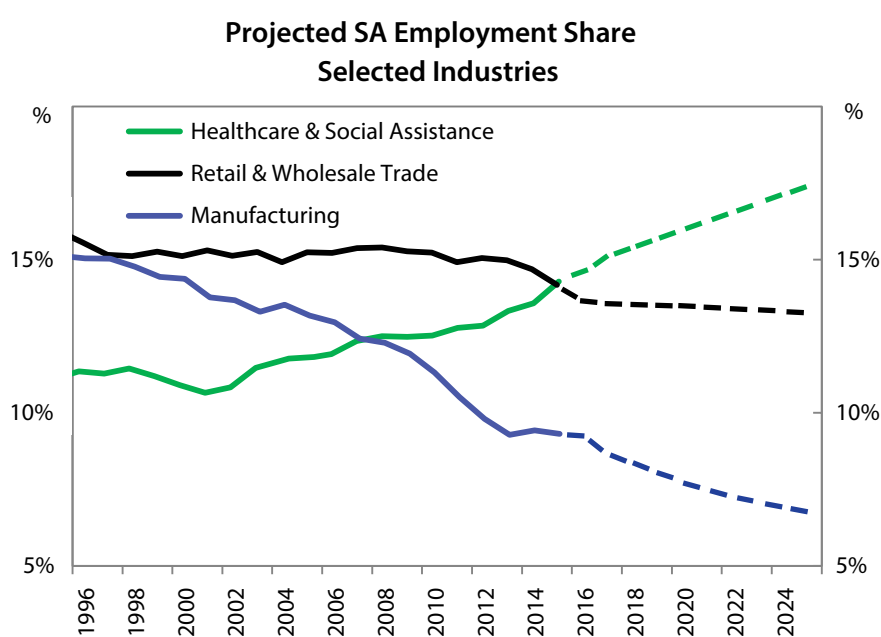
South Australia faces a challenging economic outlook over coming years, including a subdued labour market and structural changes in our industry makeup. The previously high Australian dollar had a significant impact on the competitiveness of key industries in South Australia, including manufacturing, tourism and other trade-exposed industries and the fall in commodity prices has put pressure on our mining industry to maintain revenues. These economic conditions have limited the capacity of the State Government to drive growth due to budget pressures. Business and consumer confidence remain low and annual growth in Gross State Product is expected to be subdued over coming years.

However, opportunities remain for South Australia as we look to the jobs of the future. The fall in the Australian dollar has opened new opportunities for education and agricultural exports, and the healthcare industry continues to grow as the population ages. Other export and import-competing

industries are likely to recover alongside the falling dollar and low interest rates, including advanced manufacturing and tourism. The State Government has a role in facilitating these developments by preventing skill bottlenecks, and improving the infrastructure that supports these industries. In order to take advantage of future economic developments, South Australia will need a workforce with the skills for future jobs.

The South Australian economy continues to undergo rapid structural change and the Commission anticipates it moving towards the national industrial structure by 2025. Although traditional manufacturing industries have undergone significant transformation in the past, there is reason to be optimistic about specialised manufacturing; including food, advanced and high value manufacturing. The below figure demonstrates the structural change that has occurred in South Australia and the Commission's interim economic modelling.

Figure 2 - Industrial Structural Change by Employment Share –Selected Industries 1996-2025



1.4 South Australia's Future Skills and Workforce Needs

South Australia's workforce is changing and this is expected to continue as the move toward 'knowledge-intensive' industries progresses. Traditional industries such as manufacturing and to a lesser degree mining, previously the powerhouse employers in the State, are expected to decline in terms of employment growth over the short, medium and long term. Over the next five years the highest employment growth is anticipated in the following industries:

- Health Care and Social Assistance,
- Education and Training ,
- Accommodation and Food Services and,
- Professional, Scientific and Technical Services.

Employment growth is evident in the more labour intensive service industries and sectors where the quality and quantity of labour becomes critically important, reducing the potential for automation. Individuals with inadequate Language, Literacy and Numeracy (LLN) skills will be faced with even higher barriers to employment. Males are particularly vulnerable, as they generally lag behind females in these skills. In addition, and perhaps not surprisingly, the Commission's research shows that men are likely to be most affected by the decline in the manufacturing and mining industries in South Australia.

The increasing demand for Information and Communications Technologies (ICT) means that these skills should be embedded in all aspects of education to ensure digital literacy skills into the future. Improving literacy and numeracy as well as ensuring excellent Science, Technology, Engineering and Mathematics (STEM) skills will equip people to participate in the digital economy of the future.

Investing in higher level qualifications will enhance employment outcomes for individuals. Nationally, employment for those with bachelor degrees or higher is projected to increase strongly by 466,700 (or 13.1 percent) over the five years to November 2019, tapering down to an increase in employment by 299,000 (or 9.9 percent) for those with a Certificate II or III, providing opportunities for lower skilled job seekers. Then weaker again for those with a Certificate I or secondary education¹ at only 117,200 (or 6.0 percent) growth.

Youth unemployment remains stubbornly high. Employers are looking for people with relevant work experience, but this cannot be gained without the opportunity to enter the workforce. Entry pathways to employment need to be created by industries, not only to provide young people with the opportunity to work but also to create workforces that cater to future skills needs.

¹ - <https://cica.org.au/wp-content/uploads/Employment-Outlook-to-November-2019.pdf>

1.5 Survey Response

The IPQ Survey received 850 responses across 18 industry sectors. Respondents were asked to identify their organisation type and industry sub-sector. Respondents who identified as employers were also asked their current number of employees, as well as how many additional employees they expected to hire in coming years. The Commission was impressed with the number of employers that responded, and particularly the fact that 58 percent of employers identified as a small or micro-business with less than 20 employees.

By industry, responses were highest for Health Care and Social Assistance, Manufacturing and Transport, and Postal and Warehousing. Responses were lowest for Mining and Electricity, Gas, Water and Waste Services.

Figure 3 - IPQ Survey Responses by Organisation Type and Employer Size

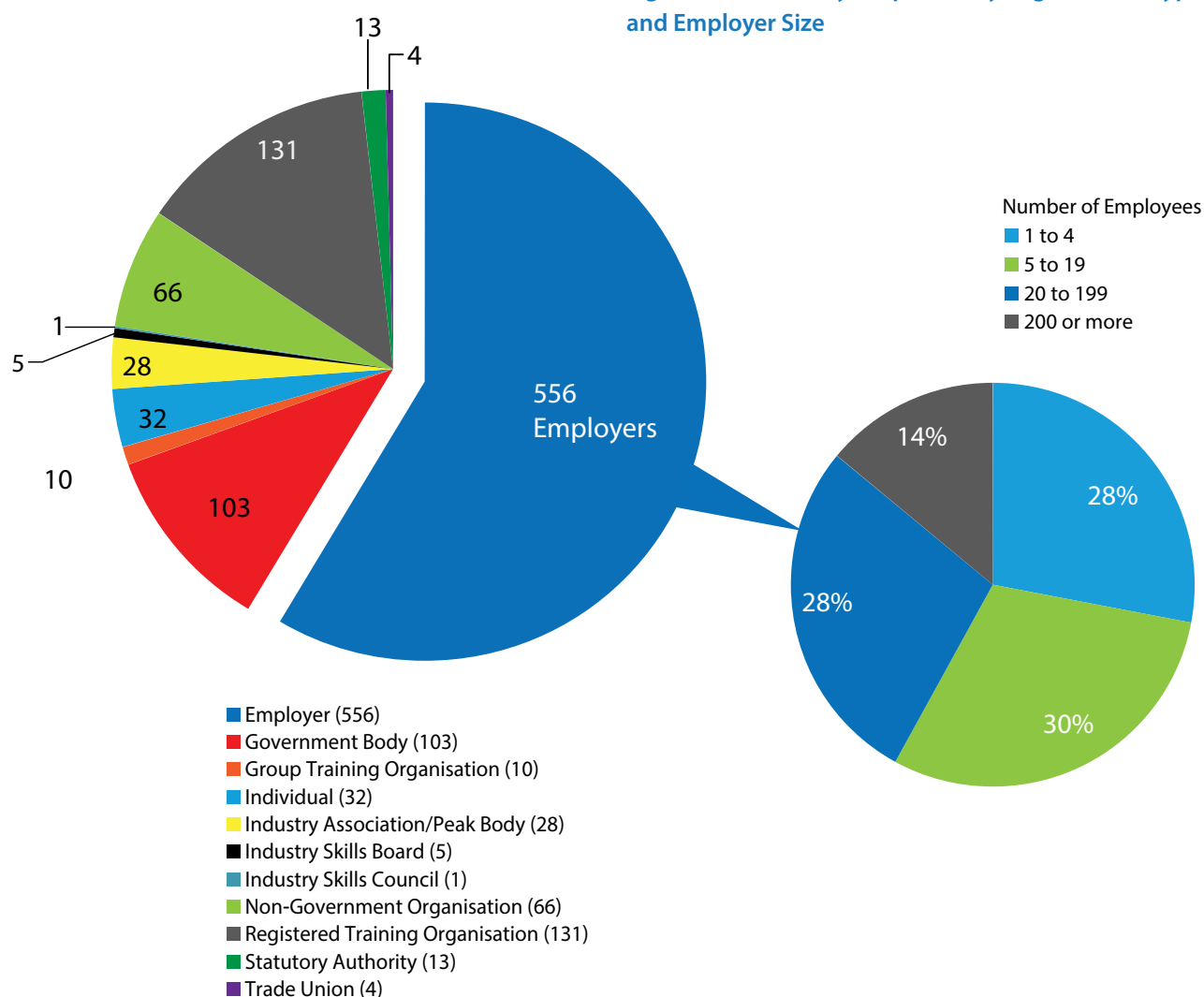
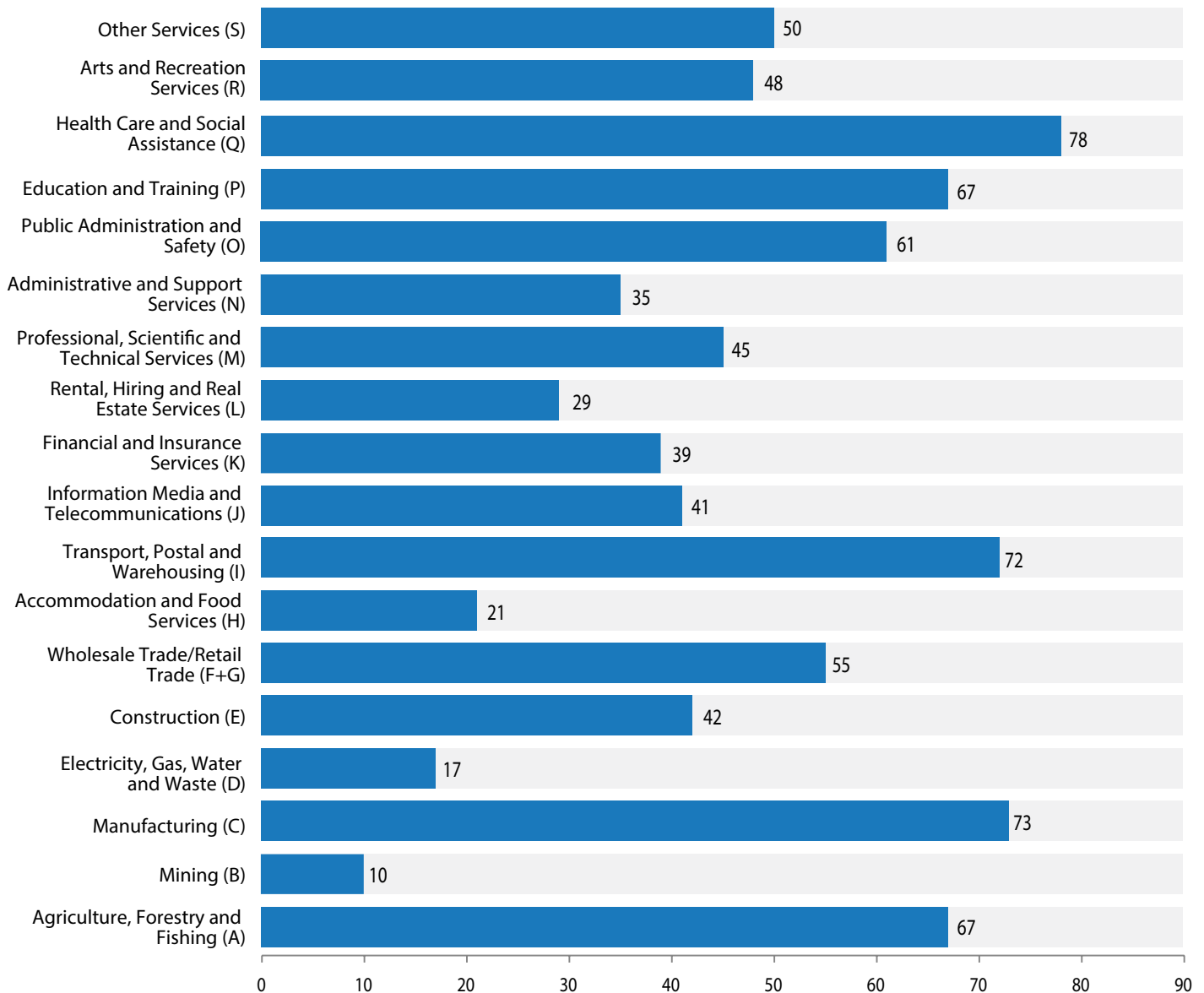


Figure 4 - IPQ Survey Responses by Industry

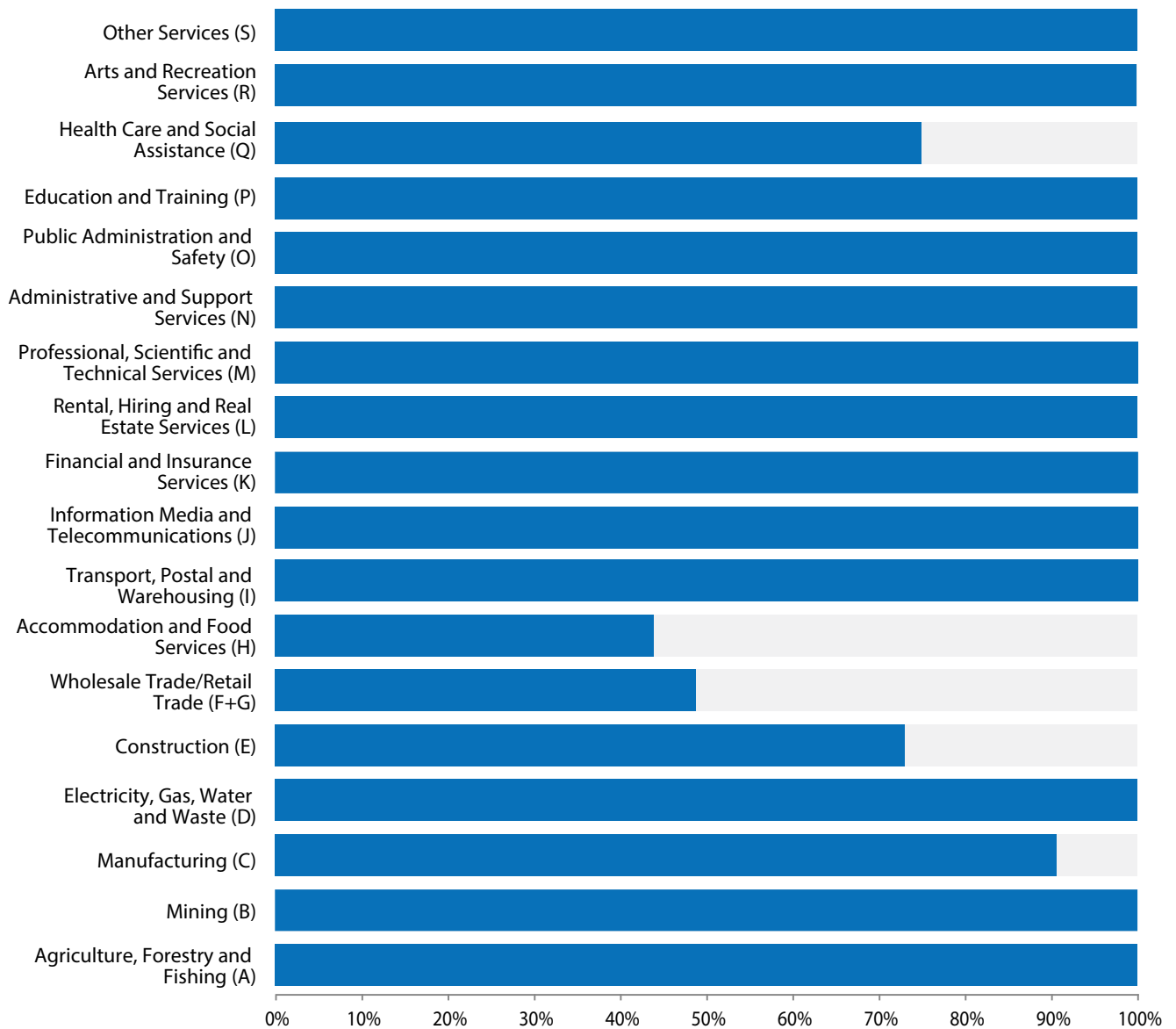


The Commission had an overall target of 750 responses for the IPQ Survey, which allowed individual targets to be set for each industry, based on their share of State employment.

These targets were met in all but five industries. In particular, Accommodation and Food Services, and Retail and Wholesale Trade were below target. This can be partly explained by the nature of those industries, in that they each have a large employment share, but also a large number of small and micro businesses -for which the

perceived value proposition of completing the IPQ Survey is lower. However, the Commission received robust industry representation from stakeholders for these industries, and is very comfortable with the integrity of the results, given the type of organisations and the size of employers who completed the Survey.

Figure 5 - IPQ Survey Percentage Achieved of Target Responses



1.6 Skills Clusters

The concept of 'Skills Clusters' was introduced to determine the relative importance of generic groups of skills over the next 5-10 year period. A primary aim of this process was to encourage feedback from those Survey participants who may be unable to clearly identify Qualifications, Skill Sets or Accredited Courses (QSCs) that directly correspond to their current and future skills needs. For the purpose of analysis, skills clusters are constructs only and are not aligned to specific QSCs.

Although the results from this Survey component have not contributed to the prioritisation of VET qualifications, this process has enabled the Commission to profile skills clusters to identify emerging trends across industry sectors and the wider economy.

The skills clusters ranked most highly across industries by IPQ Survey respondents were Managerial and Leadership, Sales and Customer Service, and Information and Technology. These were followed by Work Health and Safety, which was considered the most important skill by industries recognised for the higher risk of injury including Agriculture, Forestry and Fishing, Mining, Electricity, Gas, Water and Waste and Transport, Postal and Warehousing.

The Administration and Support skills cluster was ranked fifth by all respondents. Language, Literacy and Numeracy (LLN) and Entrepreneurial skills clusters were ranked as the highest priority by the Education and Training Industry and the Arts and Recreation Services Industry respectively. However, the overall ranking of these two skills clusters was surprisingly lower across the whole of industry.

Table 1 - Whole of Economy Ranked Skills Clusters

Skills Clusters	Ranking
Managerial & Leadership	1
Sales & Customer Service	2
Information & Technology	3
Work Health & Safety (WHS)	4
Administration & Support	5
Financial	6
Marketing & Engagement	7
Human Resources	8
Sustainability & Environmental	9
Language, Literacy & Numeracy (LLN)	10
Entrepreneurial	11

2. KEY CONSTRAINTS & LIMITATIONS

ANZSIC classifications

Consistent with its publications over a number of years, the Commission made the decision to use the Australia and New Zealand Standard Industrial Classification (ANZSIC) to aid in the segmentation and reporting of IPQ data. This allows easy comparison with other data sets to support Government decision making processes. It also assisted respondents to have a more streamlined Survey experience, and permitted the creation of stakeholder groups to moderate the Survey data.

During discussions with stakeholders, a consistent theme emerged that several of the ANZSIC classifications were no longer fit for purpose. Some respondents and stakeholders struggled to define certain industries and sub-sectors and had difficulty in selecting their own industry and choosing relevant qualifications. The Commission acknowledges this limitation, but has the view that ANZSIC remains best practice for projects of this kind.

The Australian Qualifications Framework

The Australian Qualifications Framework is the national policy for regulated VET. Nationally accredited training in Australia is made up of qualifications and Skill Sets (grouped into Training Packages) and Accredited Courses. The Commission made the decision to only include nationally accredited training in reporting on Industry's Priority Qualifications. This allowed respondents to choose from around 4100 current QSCs to prioritise.

Training Package updates

The Commission recognises that Training Packages are constantly under review and, as a consequence, results in the Survey may not completely align to current or future qualifications and Training Packages. Questions in the Survey referenced Training Packages as they existed at May 2015. In using the results from this Survey, care should be taken to map outdated qualifications with current qualifications.

Selection Bias

Through the validation process conducted with National Centre for Vocational Education Research (NCVER), the Commission acknowledges that the raw data collected through the IPQ Survey is likely to exhibit selection bias, where:

1. The characteristics of respondents to the Survey are not representative of the total population; and
2. As a result, qualifications identified may be weighted towards a particular sub-group.

NCVER provided suggestions for stratified sampling of sub-groups based on an identified population; this methodology was not applied retrospectively.

It should be noted, that the moderation sessions with industry stakeholders, where bias resulting from employer size, sub-sector representation and RTO share were identified and addressed, is likely to have reduced the impacts of selection bias. This has been acknowledged by NCVER.

Survey complexity

Efforts were made to design a Survey that was accessible by all organisation types; however, some experience with the VET sector was required in order to fully engage with, and respond to, the Survey.

Regional perspective

It was not intended that the Interim Report specifically address Industry Priority Qualifications from a regional perspective, however, based on consistent feedback from Industry Partners, the Commission acknowledges the need for a regional understanding of industry's priorities and will seek to provide future commentary on industry's regional skills and workforce needs.



Regional Perspective

The Commission will undertake further work on understanding IPQ from a regional perspective

3. FURTHER CONSIDERATIONS

Out of a total of 4,100 Qualifications, Skill Sets and Accredited Courses (QSC's) around 1,100 were identified as a priority by Survey respondents as reflected in the first four Tiers of Priority Qualifications. The non-identification of around 3,000 qualifications provides evidence that there is an over-proliferation of VET qualifications, but may also highlight the difficulty in navigating the complexities of the Australian Qualifications Framework (AQF).

Results from this Survey suggest that a large number of VET qualifications are not considered a priority by Industry as there were a significantly low proportion of qualifications identified (1136 out of a possible 4100 QSCs).

The Commission's dataset on Industry's Priority Qualifications will provide a useful contrast to the NCVER Total VET Activity (TVA), and may allow for an in depth analysis of variations between student and industry demand in order to better reflect the complexity of VET utilisation in South Australia.

The vast majority of qualifications identified as a priority through the consultation process closely align to those qualifications currently receiving public funding on the Subsidised Training List (STL). Around 80% of VET qualifications that appeared in one of the top three Priority Tiers were also eligible for public subsidy on the current STL.

The Commission acknowledges that the current policy settings of the State Government primarily do not support Skill Sets public subsidy. However, 224 Skill Sets were identified as a priority by Survey respondents, including 26 Skills Sets that were identified as a High Priority or Highest Priority by industry.

The Training and Skills Commission is aware of the importance of non-accredited and accredited qualifications delivered in the Adult Community Education (ACE) sector that promote engagement and pathways to further training and employment. Separate work is currently being undertaken by the Commission to explore the public value contribution and economic benefits stemming from the transition from ACE to accredited training.

4. NEXT STEPS

The Office of the Training and Skills Commission will receive feedback from industry on the Interim Report from 8 December until the 15 February 2016 through an online feedback form available at www.tasc.sa.gov.au.

In accordance with the Commission's commitment to transparency, and to support additional feedback the full list of QSCs identified by industry, is also accessible via the Commission's website.



IPQ Dataset

Available on the Training and Skills Commission website:
www.tasc.sa.gov.au

The IPQ dataset contains information on the prioritisation of QSCs in each of the 18 industry sectors, including where moderation based on the Commission's methodology has impacted on the level of priority for the Whole of Economy list (Output 2).

Respondents are encouraged to comment on any Qualifications, Skill Sets and Accredited Courses (QSCs) that they deem to be a priority that may not be represented in an appropriate Tier in the Whole of Economy list (Output 2). Respondents are to provide an explanation as to why a QSC may have been omitted from an appropriate Tier during consultation and a rationale for why it may warrant reprioritisation.

All representations made over this next phase of consultation will be considered as qualitative input into the Final Report before submission to the Minister in March 2016.

The Government will then consider the Commission's Report. It is expected that the findings of the Final Report will make a significant contribution to the priorities of Government.

In order to assist the State Government with these considerations, the Commission will provide advice on how to interpret the results from the Final Report on South Australia's Industry Priority Qualifications.

5. PROCESS

5.1 Approach to Consultation

The Commission was committed to a transparent approach to consultation with its stakeholders to identify Industry Priority Qualifications (IPQs). Every effort was made to communicate the Commission's work agenda and the approach to consultation with stakeholders, and to provide opportunity for input and feedback throughout the various phases of consultation. Stakeholder participation in the design of the consultation process was critical to maximise identification of Priority Qualifications for each Industry and across the South Australian economy.

A Survey was chosen as the primary method to ascertain feedback on IPQs. Qualitative inputs were used to complement the quantitative data from the IPQ Survey. An important consideration was the ability for Survey participants to identify their priorities from a wide range of qualifications, rather than only those qualifications on the Subsidised Training List. The intention of this approach was to reduce bias associated with the prioritisation of qualifications based on the existing policy settings of government.

This approach to consultation has received strong support from industry stakeholders who have partnered with the Commission to validate the methodology and results stemming from the IPQ Survey.

The Commission consulted with stakeholders representing a broad cross section of industries that included:

- Employers and Employer Groups
- Industry Associations and Representative Bodies
- Employee Associations and Representative Bodies
- Schools
- Government
- Registered Training Organisations (RTOs)
- Group Training Organisations (GTOs)

The Commission undertook the following phases of consultation:

Validation of the Commission's approach to consultation

The Commission involved a group of industry stakeholders to assist in designing and validating the Survey methodology and ensure that the approach to consultation was suitable for identifying industry's priorities.

Industry Priority Qualification (IPQ) Survey

The IPQ Survey provided a unique opportunity for stakeholders to identify their Priority Qualifications across industry sectors. The IPQ Survey was accessible online for four weeks from 9 September to 9 October 2015. Survey reach was enhanced through its wide distribution by the Commission's Industry Partners and an extensive communications plan.

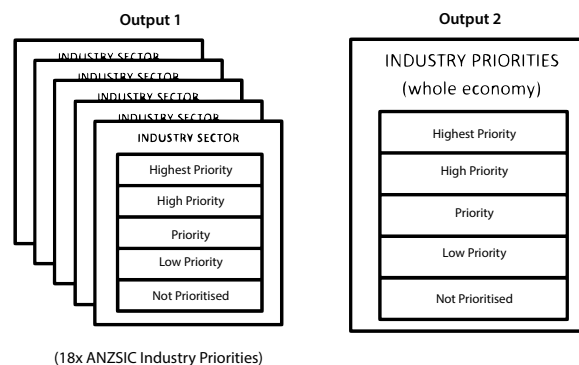
5.2 Priority Lists

Survey results identified a list of Priority Qualifications for each Industry (Output 1) and a list of Priority Qualifications for the Whole of Economy (Output 2).

Priority Tiers were established based on the level of importance assigned to qualifications. These groupings were detailed and confirmed through extensive consultation with industry stakeholders and have been organised in natural groupings according to their numerical value (see description below):

- Tier 1: Highest Priority
- Tier 2: High Priority
- Tier 3: Priority
- Tier 4: Low Priority
- Tier 5: Not Prioritised

Figure 6 - TaSC IPQ Deliverables (Output 1 and 2)



The following formula was devised to assist in producing initial priority lists for the moderation process (Output 1 and 2):

Output 1 – Industry Priority Qualifications

To create a priority list for each industry sector:

1. Assign a score based on the number of qualifications identified as 'Essential' or 'Useful'
2. Add to the score based on the number of respondents who 'would contribute' to the training
3. Add a small bonus for non-curated qualifications
4. Check, and if necessary adjust, for bias in:
 - a) the size of organisations that responded,
 - b) the industry sub-sector representation,
 - c) the type of organisation (e.g. training provider or employer).

Qualifications were then grouped into five Priority Tiers based on these scores.

Output 2 – Whole of Economy Priority Qualifications

1. Assign a score to each qualification, based on its final priority Tier in Output 1
2. Adjust (+) each qualification for the quantitative number of industries that selected it.
3. Adjust (+) each qualification based on its self-identified multiple occupational applicability
4. Adjust (+) each qualification based on its self-identified multiple industry applicability
5. Adjust (+) each qualification based on its self-identified use, e.g;
 - a. Preparation for employment – 0
 - b. Entry-level qual – 2
 - c. Upskilling – 1
6. Adjust (+) each qualification based on whether it is a self-identified Contracted Trade
7. Adjust (+, -) each qualification based on its industry's projected employment growth
8. Adjust (+, -) each qualification based on its industry's current GSP to employment ratio

Qualifications were again grouped into five Priority Tiers for the Whole of Economy based on these scores.

The table below summarises the Output 2 rules into four categories: industry identified priorities, applicability, link to employment outcomes, and link to Gross State Product.

Figure 7 - Rules: Whole of Economy Priorities (Output 2) Methodology

Policy Position	Category	Variable	Impact
Industry Identified Priorities	Output 1 Priority Tier	One	↑↑↑↑
		Two	↑↑
		Three	↑
		Four	—
Applicability	Top 3 Tiers in Multiple Industries	Each additional industry	↑
	Self-identified Occupational Applicability	Useful for Multiple Jobs	↑
		Useful for a Specific Job	—
	Self-identified Industry Applicability	Useful for Multiple Industries Useful for a Specific Industry	↑ —
Linked to Employment Outcomes	Self-identified Reason for Training	Entry level qual	↑↑↑
		Up-skilling	↑
		Preparation for employment	—
	Self-identified Contracted Trade	Yes No	↑ —
Linked to Gross State Product	Industries Ranked by Forecast Employment Growth	Each additional ranking	↑
	Industries Ranked by Current Productivity	Each additional ranking	↑

Moderation of Survey Results

Industry priorities (Output 1)

The Commission held consultations with industry stakeholders representing each industry sector. The purpose of this phase of consultation was to validate and moderate (where appropriate) the level of priority assigned to each qualification. The overarching aim was to ascertain a qualitative narrative to support the quantitative data underpinning the Survey responses. A secondary aim of these sessions was to solicit feedback on the Commission's employment growth projections for each industry.

Whole of Economy priorities (Output 2)

Broad stakeholder participation in this final phase of the consultation process prior to the release of the IPQ Interim Report was critical to ensure wide industry representation and a genuine assessment of the relative priority of qualifications between industry sectors. This consultation involved moderation and validation of Industry Priority Qualifications (across the economy) with the Australian Council for Private Education and Training (ACPET), Australian Industry Group (AiGroup), Business SA and SA Unions.

5.3 The Role of Stakeholders and Industry Partners

The Commission's IPQ consultation required high-level stakeholder engagement to ensure its outcomes were credible and based on genuine industry advice. Moreover, it was important that the consultation process was transparent in terms of the underlying methodology and outputs. The Commission attempted to strike a balance that facilitated engagement which was fit-for-purpose, while also ensuring that it was not over-servicing or over-consulting its key stakeholders and Industry Partners.

A framework that articulated the Commission's approach also served to mitigate the risk of continual moderation and manipulation of data to achieve a specific result. In this context, the purpose of the validation process was not necessarily to moderate the results, but rather to provide context to the data inputs and create stakeholder buy-in in terms of the 'rules' and explore where 'exceptions to the rules' may need to be considered by the Commission.

The formulas and principles corresponding to the moderation of Output 1 and 2 are set out in Section 5. Industry Partners will have an extended window of opportunity to provide more comprehensive feedback following the publication of this Interim Report on South Australia's Industry Priority Qualifications.

It is critical to note that the mathematical formula for creating an initial priority list was only the first step in the process. It was not suggested that simply applying the formula to the quantitative information gathered through the Survey tool would be sufficient to adhere to the consultation and approach principles outlined above. Discussion with Industry Partners on context and possible bias as well as qualitative analysis was required to add value and produce a list of Priority Qualifications for each industry sector.

5.4 Validation with NCVER

The Commission received input and support from NCVER to explore the data collection, rule-based criteria and validation principles that make up the methodology used to obtain Industry's Priority Qualifications.

NCVER and the Commission agreed on the following joint Statement:

'The Commission has engaged NCVER to validate the method used to analyse the results of the Industry Priority Qualifications (IPQ) Survey. NCVER are reasonably satisfied that the statistical biases and anomalies from the Survey have been largely addressed through qualitative input from industry bodies. Where appropriate, NCVER data sets have been used to supplement the Commission's quantitative analysis of the IPQ Survey results.'*

*Total VET Activity (TVA); and Employers Use and Views of the VET System

5.5 Survey Design and Data Collection

The IPQ Survey was designed during the first half of 2015. The Commission sought feedback from various stakeholders on both Survey structure and question design. The guiding principle in designing the Survey was to make it as accessible as possible to a wide range of potential respondents, while still obtaining data detailed enough to enable the Commission to fulfil the Minister's request to identify Industry's Priority Qualifications. A valuable feedback session was conducted over a half-day with over 20 of South Australia's high-level VET industry stakeholders that provided direct advice on necessary changes to the Survey design. This also provided the Commission with general acceptance from industry that this was an achievable and valuable project to undertake.

Qualifications, Skill Sets and Accredited Courses used in the Survey were obtained from training.gov.au in May 2015. Any changes to qualifications or Training Packages after that date were not included in the Survey and will not be included in this report.

In designing the data collection process, the Commission identified several databases of industry participants, collected through years of industry consultation, who would be invited to complete the Survey. Advertisements were also placed in relevant industry publications. Responses were tracked in real time and compared to State employment share stratified into industry sub-sectors. During the four weeks the Survey was open, the Commission attempted to promote the Survey to sub-sectors with lower response rates. This resulted in a fairly representative sample across industries in our final data.

5.6 Consultation: Industry Sectors (Output 1)

In total, the Commission held 20 stakeholder consultation sessions covering all 18 ANZSIC industries to validate the raw data from the Survey. The consultation sessions provided valuable qualitative assessments around the Survey results, which are reflected in the industry profiles in this report.

In some industry sectors, the raw Survey results directly reflected industry's priorities and required very little moderation. In other sectors, bias in the results, either from sub-sector misrepresentation, weighting towards one employer size or type of respondent, or a very low response rate, resulted in Priority Qualifications that were not deemed representative of the industry.

In these cases some qualifications were shifted between Tiers, with the reasoning for each shift documented by the Commission. Importantly, the reasons for shifting qualifications were consistent across all industries.

Stakeholders also provided feedback on the Commission's economic modelling, including employment growth projections for each industry.

5.7 Consultation: Whole of Economy (Output 2)

Following the Output 1 consultation sessions, the Commission convened a meeting with peak bodies with wide representation across many industries. These bodies included the Australian Council for Private Education and Training (ACPET), Australian Industry Group (AiGroup), Business SA and SA Unions.

The purpose of this meeting was to validate the methodology and results for Output 2 (as described above in section 5.1). The methodology was widely accepted, although the Commission did make adjustments upon strong recommendations.

Through applying the Output 2 methodology, the 1138 qualifications identified through the IPQ Survey were ranked and divided into Priority Tiers. 105 qualifications were assigned to 'Highest Priority (Tier 1)'; 146 were assigned to 'High Priority (Tier 2)' and 224 assigned to 'Priority (Tier 3)'. The remaining 663 were assigned to 'Low Priority (Tier 4)'. Any qualifications not selected through the Survey (around 3000) were assigned to 'Not Prioritised' (Tier 5).

The peak bodies had an opportunity to view the qualifications in Output 2, to ensure the methodology was producing appropriate results. Very few changes were made to the overall results, and again, all changes were documented. The following moderation principles were applied when considering any changes, and reference was also made to NCVER's Total VET Activity.

Moderation Principles:

1. No qualification can be shifted more than one priority Tier.
2. If a qualification was moderated down in the Output 1 consultation session (e.g. from Tier 1 to Tier 2) then that qualification cannot move up in moderation of Output 2
3. Qualifications that moved from Tier 1 to Tier 2 through the Output 2 methodology were individually reviewed for appropriateness.
4. Qualifications that had been prioritised as Tier 3 through the Output 1 process were not allowed to move to Tier 4 through the Output 2 calculation.

6. INDUSTRY PRIORITY QUALIFICATIONS (WHOLE OF ECONOMY)

One of the challenges in creating a 'Whole of Economy' list (Output 2) was balancing the priorities of multiple and diverse industry sectors. The Commission devised a formula (see Section 4) that brought together all of the individual industry priorities from Output 1. Using this formula, each industry was initially weighted the same; for example, a Tier 1 in Industry A was given the same value as a Tier 1 in Industry B. The formula used other factors to establish overall priorities, including applicability across multiple jobs and industries and projected employment growth for each industry.

In response to feedback received from industry stakeholders on Output 2 methodology, the Commission also added current industry productivity to the formula for Output 2. Stakeholders explained that some industries had low employment share in the economy, but had a much higher share of GSP contribution.

The majority of top Priority Qualifications for each industry in Output 1 were also top priority in Output 2 for the Whole of Economy, with just 25 percent of Output 1 top Industry Priority Qualifications moving down in the overall list.

6.1 Intended Use

It is not the intention for the results stemming from the identification of Industry Priority Qualifications to directly inform (the level of) publicly subsidised training activity. Rather, it is one input out of five that will be considered. The Commission is encouraged by the fact that this is the first time that the Government will have a comprehensive understanding of industry's VET priorities to support South Australia's future workforce needs.

While this report does not specifically consider pre-vocational qualifications, the Commission acknowledges the important role of pre-vocational skills in preparing individuals for further study and employment. The results from this Survey suggest that a separate framework is necessary to separate those qualifications that provide vocational skills and those that are preparatory for further learning pathways. It is anticipated that this will bolster the importance of pre-vocational qualifications through better targeting State Government funding in this area.

Although the volume of activity for each qualification was identified using NCVER's Total VET Activity (TVA), that data source did not form part of our official methodology for producing Output 1 or Output 2. The Commission is aware that TVA data may demonstrate an alternative view on Priority Qualifications.

Qualifications used in the IPQ Survey were obtained from training.gov.au in May 2015. Several training packages have been updated in the ensuing months. Care should be taken to map outdated qualifications to more recent qualifications when using this data.

The Commission will share this data with appropriate Government agencies but is conscious of it being used in the full context of how intelligence was gathered, its intended purpose and abiding by its commitment to industry stakeholders on its consultation principles.

6.2 Industry Priority Qualifications

The Whole of Economy list of qualifications on the following pages is prioritised according to the following principles:

1. Qualifications listed within Priority Tiers (1-4) have been grouped and are not listed in order of priority,
2. Qualifications are sorted by the type of qualification (from Graduate Diploma through to Skill Set/s) and,
3. Alphabetically listed (in ascending order) according to the name of the Qualification, Skill Set or Accredited Course.

Table 2 - Whole of Economy (Output 2) Priority Qualifications List

Whole of Economy - Output 2

Tier 1 (Highest Priority)

Advanced Diploma

Advanced Diploma of Accounting
Advanced Diploma of Creative Product Development

Diploma

Diploma of Early Childhood Education and Care
Diploma of Financial Services
Diploma of Graphic Design
Diploma of Human Resources Management
Diploma of Nursing (Enrolled-Division 2 nursing)
Diploma of Property Services (Agency Mgt)
Diploma of Retail Management
Diploma of Vocational education and training
Diploma of Website Development
Diploma of Work Health and Safety

Certificate IV

Certificate IV in Accounting
Certificate IV in Bookkeeping
Certificate IV in Business Sales
Certificate IV in Financial Services
Certificate IV in Health Administration
Certificate IV in Information Technology
Certificate IV in Information Technology Networking
Certificate IV in Language, Literacy & Numeracy
Assessment & Training (Acc. Course)
Certificate IV in Leadership and Management
Certificate IV in Library, Information & Cultural Services
Certificate IV in Local Government (Regulatory Services)
Certificate IV in Mental Health
Certificate IV in Property Services (Real Estate)
Certificate IV in Retail Management
Certificate IV in Small Business Management
Certificate IV in Sport and Recreation
Certificate IV in Teaching English to Speakers of
Other Languages (TESOL) (Acc. Course)
Certificate IV in Training and Assessment
Certificate IV in Visual Arts
Certificate IV in Work Health and Safety
Certificate IV in Youth Work

Certificate III

Certificate III in Accounts Administration
Certificate III in Aged Care
Certificate III in Air-conditioning and Refrigeration
Certificate III in Aquaculture
Certificate III in Aquatics
Certificate III in Bricklaying/Blocklaying
Certificate III in Business
Certificate III in Business Administration
Certificate III in Carpentry
Certificate III in Civil Construction
Certificate III in Commercial Cookery
Certificate III in Community Services Work
Certificate III in Customer Engagement
Certificate III in Data and Voice Communications
Certificate III in Disability
Certificate III in Driving Operations
Certificate III in Early Childhood Education and Care
Certificate III in Electrotechnology Electrician
Certificate III in Engineering - Composites Trade

Certificate III in Engineering - Electrical/Electronic Trade
Certificate III in Engineering - Fabrication Trade
Certificate III in Engineering - Mechanical Trade
Certificate III in Engineering - Production Systems
Certificate III in Engineering - Technical
Certificate III in ESI - Power Systems - Distribution Overhead
Certificate III in Financial Services
Certificate III in Food Processing
Certificate III in Hairdressing
Certificate III in Harvesting and Haulage
Certificate III in Health Administration
Certificate III in Health Services Assistance
Certificate III in Home and Community Care
Certificate III in Horticulture
Certificate III in Hospitality
Certificate III in Information, Digital Media and Technology
Certificate III in Instrumentation and Control
Certificate III in Irrigation
Certificate III in Live Production and Services
Certificate III in Local Government (Regulatory Services)
Certificate III in Logistics
Certificate III in Mine Emergency Response and Rescue
Certificate III in Papermaking Operations
Certificate III in Plumbing
Certificate III in Production Horticulture
Certificate III in Property Services (Agency)
Certificate III in Recordkeeping
Certificate III in Retail Baking (Combined)
Certificate III in Retail Operations
Certificate III in Retail Supervision
Certificate III in Roof Plumbing
Certificate III in Sawmilling and Processing
Certificate III in Surface Extraction Operations
Certificate III in Work Health and Safety
Certificate II in Aboriginal or Torres Strait Islander
Cultural Arts

Certificate II

Certificate II in Agriculture
Certificate II in Business
Certificate II in Driving Operations
Certificate II in Electrotechnology (Career Start)
Certificate II in Emergency Medical Service First Response
Certificate II in Engineering - Production Technology
Certificate II in Health Support Services
Certificate II in Hospitality
Certificate II in Information, Digital Media and Technology
Certificate II in Kitchen Operations
Certificate II in Logistics
Certificate II in Maritime Operations (Coxswain Grade 1
Near Coastal)
Certificate II in Maritime Operations (Marine Engine Driver
Grade 3 Near Coastal)
Certificate II in Retail Services
Certificate II in Surface Extraction Operations
Certificate II in Warehousing Operations

Skill Set

Skill Set (MAR) - Safety Training Certification Skill Set
Skill Set (MAR) - Shipboard Safety Skill Set

Whole of Economy - Output 2

Tier 2 (High Priority)

Advanced Diploma

Advanced Diploma of Business
Advanced Diploma of Conveyancing
Advanced Diploma of Engineering
Advanced Diploma of Graphic Design
Advanced Diploma of Hospitality
Advanced Diploma of Leadership and Management
Advanced Diploma of Management (Human Resources)
Advanced Diploma of Nursing (Enrolled/Div 2 nursing)
Advanced Diploma of Work Health and Safety

Diploma

Diploma of Accounting
Diploma of Agribusiness Management
Diploma of Agriculture
Diploma of Arboriculture
Diploma of Business Administration
Diploma of Community Services (Case management)
Diploma of Database Design and Development
Diploma of Engineering - Advanced Trade
Diploma of Events
Diploma of Finance and Mortgage Broking Mgt
Diploma of Financial Planning
Diploma of Horticulture
Diploma of Hospitality
Diploma of Information Technology
Diploma of Information Technology Networking
Diploma of Insurance Broking
Diploma of Leadership and Management
Diploma of Live Production and Technical Services
Diploma of Marketing
Diploma of Production Horticulture
Diploma of Project Management
Diploma of Software Development
Diploma of Sport Development
Diploma of Training Design and Development
Diploma of Visual Merchandising

Certificate IV

Certificate IV in Agriculture
Certificate IV in Allied Health Assistance
Certificate IV in Banking Services
Certificate IV in Beauty Therapy
Certificate IV in Business
Certificate IV in Business Administration
Certificate IV in Child, Youth and Family Intervention
Certificate IV in Commercial Cookery
Certificate IV in Community Services Work
Certificate IV in Companion Animal Services
Certificate IV in Computer Systems Technology
Certificate IV in Disability
Certificate IV in Electrical - Instrumentation
Certificate IV in Electrical - Renewable Energy
Certificate IV in Engineering
Certificate IV in English Proficiency
Certificate IV in Hairdressing
Certificate IV in Hospitality
Certificate IV in Human Resources
Certificate IV in Information Technology Support

Certificate IV in Live Production and Technical Services
Certificate IV in Logistics
Certificate IV in Marketing
Certificate IV in Outdoor Recreation
Certificate IV in Papermaking Operations
Certificate IV in Programming
Certificate IV in Project Management Practice
Certificate IV in Purchasing
Certificate IV in Renewable Energy
Certificate IV in Train Driving
Certificate IV in Transport and Logistics (Road Transport Heavy Vehicle Driving Instruction)
Certificate IV in Veterinary Nursing
Certificate IV in Web-Based Technologies
Certificate IV in Wool Classing

Certificate III

Certificate III in Agricultural Mechanical Technology
Certificate III in Agriculture
Certificate III in Allied Health Assistance
Certificate III in Automotive Diesel Engine Technology
Certificate III in Automotive Electrical Technology
Certificate III in Automotive Sales
Certificate III in Beauty Services
Certificate III in Business Administration (Education)
Certificate III in Cabinet Making
Certificate III in Carpentry and Joinery
Certificate III in Catering Operations
Certificate III in Community Pharmacy
Certificate III in Concreting
Certificate III in Drilling Oil/Gas (On shore)
Certificate III in Drilling Operations
Certificate III in English Proficiency
Certificate III in Fitness
Certificate III in Furniture Making
Certificate III in Gas Fitting
Certificate III in Gas Supply Industry Operations
Certificate III in Health Support Services
Certificate III in Insurance Broking
Certificate III in Maritime Operations (Marine Engine Driver Grade 2 Near Coastal)
Certificate III in Maritime Operations (Master up to 24 metres Near Coastal)
Certificate III in Meat Processing (Boning Room)
Certificate III in Meat Processing (Meat Safety)
Certificate III in Meat Processing (Slaughtering)
Certificate III in Mobile Plant Technology
Certificate III in Outdoor Recreation
Certificate III in Painting and Decorating
Certificate III in Police Studies (Accredited Course)
Certificate III in Printing and Graphic Arts (Digital Printing)
Certificate III in Printing and Graphic Arts (Graphic Prepress)
Certificate III in Printing and Graphic Arts (Print Finishing)
Certificate III in Resource Processing
Certificate III in Retail Baking (Bread)
Certificate III in Retail Baking (Cake and Pastry)
Certificate III in Rural Operations

Whole of Economy - Output 2

Tier 2 (High Priority)

Certificate III (cont...)

Certificate III in Sawdoctoring
Certificate III in Shearing
Certificate III in Spoken and Written English
Certificate III in Sport and Recreation
Certificate III in Sterilisation Services
Certificate III in Timber Truss and Frame Design & Manufacture
Certificate III in Tourism
Certificate III in Wall and Ceiling Lining
Certificate III in Warehousing Operations
Certificate III in Waste Driving Operations

Certificate II

Certificate II in Arboriculture
Certificate II in Automotive Sales
Certificate II in Automotive Servicing Technology
Certificate II in Civil Construction
Certificate II in Community Services
Certificate II in Construction
Certificate II in Construction Pathways
Certificate II in Drilling Oil/Gas (On shore)
Certificate II in Drilling Operations
Certificate II in Engineering
Certificate II in Financial Services
Certificate II in Fishing Operations
Certificate II in Food Processing
Certificate II in Horticulture
Certificate II in Metal Roofing and Cladding
Certificate II in Nail Technology
Certificate II in Production Horticulture
Certificate II in Road Transport Yard Operations (Freight Handler)
Certificate II in Rural Operations
Certificate II in Security Operations
Certificate II in Shearing
Certificate II in Spoken and Written English
Certificate II in Underground Metalliferous Mining

Certificate I

Certificate I in Agrifood Operations
Certificate I in Engineering
Certificate I in Retail Services

Skill Set

Skill Set (FPI) - Skill Set for a forestry log truck driver
Skill Set (FPI) - Skill Set for a forwarder operator
Skill Set (FPI) - Skill Set for a loader operator
Skill Set (SIT) - Food Safety Supervision

Tier 3 (Priority)

Advanced Diploma

Advanced Diploma of Agribusiness Management
Advanced Diploma of Agriculture
Advanced Diploma of Building and Construction (Mgt)
Advanced Diploma of Community Sector Management
Advanced Diploma of Dance (Elite Performance)
Advanced Diploma of Dental Prosthetics
Advanced Diploma of Electrical - Engineering
Advanced Diploma of Engineering Technology - Electrical
Advanced Diploma of Events
Advanced Diploma of Forest Industry Sustainability
Advanced Diploma of Horticulture
Advanced Diploma of Live Production and Mgt Services
Advanced Diploma of Marketing
Advanced Diploma of Process Plant Technology
Advanced Diploma of Program Management
Advanced Diploma of Screen and Media
Advanced Diploma of Visual Arts

Diploma

Diploma of Aeroskills (Avionics)
Diploma of Aeroskills (Non-Destructive Testing)
Diploma of Air-conditioning and Refrigeration Engineering
Diploma of Aquaculture
Diploma of Arts (Professional Writing)
Diploma of Aviation Maintenance Management (Avionics)
Diploma of Beauty Therapy
Diploma of Building and Construction (Building)
Diploma of Building and Construction (Management)
Diploma of Building Design
Diploma of Business
Diploma of Child, Youth and Family Intervention
Diploma of Community Services Coordination
Diploma of Conservation and Land Management
Diploma of Counselling
Diploma of Dance (Elite Performance)
Diploma of Dental Technology
Diploma of Education Support
Diploma of Electrical Engineering
Diploma of Engineering - Technical
Diploma of Engineering Drafting (Accredited Course)
Diploma of Food Processing
Diploma of Holiday Parks and Resorts
Diploma of Information Technology Systems Administration
Diploma of International Business
Diploma of Library and Information Services
Diploma of Logistics
Diploma of Loss Adjusting
Diploma of Music
Diploma of Outdoor Recreation
Diploma of Practice Management
Diploma of Pulp and Paper Process Management
Diploma of Purchasing
Diploma of Salon Management
Diploma of Screen and Media
Diploma of Sound Production
Diploma of Surface Operations Management

Whole of Economy - Output 2

Tier 3 (Priority)

Certificate III (contd...)

Diploma of Sustainability
Diploma of Travel and Tourism
Diploma of Veterinary Nursing (Emergency and Critical Care)
Diploma of Youth Work

Certificate IV

Certificate IV in Advertising
Certificate IV in Aeroskills (Avionics)
Certificate IV in Aged Care
Certificate IV in Air-conditioning and Refrigeration Servicing
Certificate IV in Aquaculture
Certificate IV in Arts Administration
Certificate IV in Building and Construction (Building)
Certificate IV in Building and Construction (Contract Administration)
Certificate IV in Building and Construction (Estimating)
Certificate IV in Building and Construction (Site Mgt)
Certificate IV in Building and Construction (Specialist Trades)
Certificate IV in Community Pharmacy
Certificate IV in Community Services (Information, advice and referral)
Certificate IV in Community Services Advocacy
Certificate IV in Competitive Systems and Practices
Certificate IV in Correctional Practice
Certificate IV in Customer Engagement
Certificate IV in Electrical - Data and Voice Communications
Certificate IV in Electrotechnology - Systems Electrician
Certificate IV in Food Processing
Certificate IV in Forest Operations
Certificate IV in Holiday Parks and Resorts
Certificate IV in Home and Community Care
Certificate IV in Home Sustainability Assessment
Certificate IV in Horticulture
Certificate IV in International Trade
Certificate IV in Legal Services
Certificate IV in Leisure and Health
Certificate IV in Local Government
Certificate IV in Local Government (Operational Works)
Certificate IV in Local Government Administration
Certificate IV in Manufacturing Technology
Certificate IV in Maritime Operations (Marine Engine Driver Grade 1 Near Coastal)
Certificate IV in Maritime Operations (Master up to 35 metres Near Coastal)
Certificate IV in Meat Processing (Meat Safety)
Certificate IV in Meat Processing (Quality Assurance)
Certificate IV in Mediation
Certificate IV in Metalliferous Mining Operations (Underground)
Certificate IV in Patisserie
Certificate IV in Photo Imaging
Certificate IV in Plumbing and Services
Certificate IV in Printing and Graphic Arts

Certificate IV in Production Horticulture
Certificate IV in Refrigeration and Air-conditioning Systems
Certificate IV in Resource Processing
Certificate IV in Sound Production
Certificate IV in Surface Extraction Operations
Certificate IV in Timber Truss and Frame Manufacture
Certificate IV in Transport and Logistics (Road Transport Car Driving Instruction)
Certificate IV in Warehousing Operations

Certificate III

Certificate III in Aeroskills (Mechatronics)
Certificate III in Aircraft Life Support and Furnishing
Certificate III in Aircraft Surface Finishing
Certificate III in Animal Studies
Certificate III in Animal Technology
Certificate III in Automotive Body Repair Technology
Certificate III in Automotive Refinishing Technology
Certificate III in Business Administration (Medical)
Certificate III in Business to Business Sales
Certificate III in Civil Construction Plant Operations
Certificate III in Community Activity Programs
Certificate III in Competitive Systems and Practices
Certificate III in Conservation and Land Management
Certificate III in Correctional Practice
Certificate III in Dance
Certificate III in ESI - Power Systems - Transmission Overhead
Certificate III in Events
Certificate III in Fire Protection
Certificate III in Fisheries Compliance
Certificate III in Forest Growing and Management
Certificate III in Furniture Removal
Certificate III in Holiday Parks and Resorts
Certificate III in Information and Cultural Services
Certificate III in Joinery
Certificate III in Light Vehicle Mechanical Technology
Certificate III in Local Government
Certificate III in Manufactured Mineral Products
Certificate III in Meat Processing (General)
Certificate III in Micro Business Operations
Certificate III in Mining Exploration
Certificate III in Patisserie
Certificate III in Paving
Certificate III in Personal Injury Management
Certificate III in Plant Baking
Certificate III in Printing and Graphic Arts (Printing)
Certificate III in Printing and Graphic Arts (Sacks and Bags)
Certificate III in Process Manufacturing
Certificate III in Pulping Operations
Certificate III in Roof Tiling
Certificate III in Security Operations
Certificate III in Shopfitting
Certificate III in Solid Plastering
Certificate III in Steelfixing
Certificate III in Stevedoring
Certificate III in Surveying and Spatial Information Services
Certificate III in Technical Production
Certificate III in Timber Manufactured Products

Whole of Economy - Output 2

Tier 3 (Priority)

Certificate III (contd...)

Certificate III in Underground Metalliferous Mining
Certificate III in Visual Arts
Certificate III in Wall and Floor Tiling
Certificate III in Water Operations
Certificate III in Wine Industry Operations
Certificate III in Wood Panel Products
Certificate III in Wool Clip Preparation

Certificate II

Certificate II in Aboriginal and Torres Strait Islander Visual Arts Industry Work
Certificate II in Aboriginal Language/s
Certificate II in Aircraft Line Maintenance
Certificate II in Animal Studies
Certificate II in Applied Language
Certificate II in Aquaculture
Certificate II in Automotive Electrical Technology
Certificate II in Automotive Tyre Servicing Technology
Certificate II in Community Pharmacy
Certificate II in Customer Engagement
Certificate II in Drainage
Certificate II in Education and Skills Development
Certificate II in Furniture Removal
Certificate II in Hairdressing
Certificate II in Holiday Parks and Resorts
Certificate II in Irrigation
Certificate II in Live Production and Services
Certificate II in Local Government
Certificate II in Manufacturing Technology
Certificate II in Meat Processing (Abattoirs)
Certificate II in Process Manufacturing
Certificate II in Process Plant Operations
Certificate II in Public Safety (Firefighting and Emergency Operations)
Certificate II in Rail Infrastructure
Certificate II in Resources and Infrastructure Work Preparation
Certificate II in Retail Make-Up and Skin Care
Certificate II in Skills for Work and Vocational Pathways
Certificate II in Sustainable Energy (Career Start)
Certificate II in Visual Arts
Certificate II in Water Operations
Certificate II in Wine Industry Operations
Certificate II in Wool Handling

Certificate I

Certificate I in Animal Studies
Certificate I in Construction
Certificate I in Hospitality
Certificate I in Information, Digital Media & Technology
Certificate I in Logistics
Certificate I in Textiles Clothing and Footwear
Certificate I in Tourism (Australian Indigenous Culture)
Certificate I in Transport and Logistics (Pathways)
Certificate I in Warehousing Operations
Certificate I in Work Preparation (Community services)

Skill Set

Skill Set (BSB) - Basic Customer Engagement Skill Set
Skill Set (CUA) - Acting Performance Skill Set
Skill Set (CUA) - Dance Teaching Skill Set
Skill Set (CUA) - Festivals and Events Skill Set
Skill Set (CUA) - Lighting Live Performance Skill Set
Skill Set (CUA) - Props Making Skill Set
Skill Set (CUA) - Set Construction Skill Set
Skill Set (FPI) - Skill Set for a boom delimeter operator
Skill Set (FPI) - Skill Set for forest and wood product innovation for leaders
Skill Set (FPI) - Skill Set for forest and wood product innovation for managers
Skill Set (FPI) - Skill Set for supporting forest and wood products innovation
Skill Set (ICP) - Digital Fundamentals Skill Set
Skill Set (SIS) - Climbing Instructor (Natural Surfaces) Top Rope
Skill Set (SIS) - Cycle Tour Guide On-Road (Overnight and Extended Tours)
Skill Set (SIS) - Kayaking Instructor Flat Water
Skill Set (SIT) - Product Development for International Markets
Skill Set (UET) - Refresher - Perform CPR
Skill Set (UET) - Refresher - Perform EWP Rescue and CPR
Skill Set (UET) - Refresher - Perform Pole Top Rescue
Skill Set (UET) - Refresher - Perform Rescue from a Live LV Panel and CPR

Whole of Economy - Output 2

Tier 4

Graduate Certificate/Diploma

Graduate Certificate in Community Services Practice
(Statutory child protection)

Graduate Certificate in Digital Education

Graduate Certificate in Environmental Management

Graduate Certificate in Instrumental Analysis

Graduate Certificate in Leadership Diversity

Graduate Certificate in Management (Learning)

Graduate Certificate in Sustainable Operations

Graduate Diploma of Adult Language, Literacy and
Numeracy Practice

Graduate Diploma of Art & Play Applications in Therapy

Graduate Diploma of Community Sector Management

Graduate Diploma of Engineering

Graduate Diploma of Family Dispute Resolution

Graduate Diploma of Management (Learning)

Graduate Diploma of Portfolio Management

Graduate Diploma of Relationship Counselling

Graduate Diploma of Strategic Leadership

Advanced Diploma

Advanced Diploma of Advertising

Advanced Diploma of Applied Fashion Design and
Technology

Advanced Diploma of Arts (Professional Writing)

Advanced Diploma of Automated Systems Maintenance
Engineering

Advanced Diploma of Aviation (Flight Instruction)

Advanced Diploma of Ayurveda

Advanced Diploma of Building Surveying

Advanced Diploma of Community Sector Management

Advanced Diploma of Computer Systems Engineering

Advanced Diploma of Computer Systems Technology

Advanced Diploma of Conservation and Land Mgt

Advanced Diploma of Conveyancing

Advanced Diploma of Deployment Logistics

Advanced Diploma of Disability

Advanced Diploma of Electronics & Communications
Engineering

Advanced Diploma of Industrial Electronics and
Control Engineering

Advanced Diploma of Instrumentation and
Control Engineering

Advanced Diploma of International Business

Advanced Diploma of Laboratory Operations

Advanced Diploma of Maritime Operations (Marine
Engineering Class 2)

Advanced Diploma of Maritime Operations (Master
Unlimited)

Advanced Diploma of Music

Advanced Diploma of Network Security

Advanced Diploma of Oral Health (Dental Hygiene)
(Accredited Course)

Advanced Diploma of Policing (Accredited Course)

Advanced Diploma of Process Plant Technology

Advanced Diploma of Property Services (Asset and
Facility Management)

Advanced Diploma of Public Safety (Community Safety)

Advanced Diploma of Public Safety (Emergency Mg)

Advanced Diploma of Sound Production

Advanced Diploma of Telecommunications Network
Engineering

Advanced Diploma of Travel and Tourism

Diploma

Diploma of Aboriginal and Torres Strait Islander Visual
Arts Industry Work

Diploma of Advertising

Diploma of Aeroskills (Mechanical)

Diploma of Animal Technology

Diploma of Applied Fashion Design and Technology

Diploma of Applied Geosciences (Accredited Course)

Diploma of Aromatherapy

Diploma of Automotive Technology

Diploma of Aviation (Flight Instructor)

Diploma of Aviation (Instrument Flight Operations)

Diploma of Aviation Maintenance Management
(Mechanical)

Diploma of Avionic Engineering

Diploma of Banking Services Management

Diploma of Building Design

Diploma of Business (Governance)

Diploma of Child, Youth and Family Intervention

Diploma of Community Development

Diploma of Community Services (Alcohol and other
drugs)

Diploma of Community Services (Alcohol, other drugs
and mental health)

Diploma of Community Services (Financial counselling)

Diploma of Community Services (Mental health)

Diploma of Community Services Work

Diploma of Competitive Systems and Practices

Diploma of Correctional Administration

Diploma of Costume for Performance

Diploma of Credit Management

Diploma of Customer Engagement

Diploma of Digital and Interactive Games

Diploma of Digital Media Technologies

Diploma of Disability

Diploma of Drilling Oil & Gas (On shore)

Diploma of Drilling Operations

Diploma of Early Childhood Education and Care

Diploma of Education Support

Diploma of Electrical and Refrigeration and
Air-conditioning

Diploma of Electronics and Communications
Engineering

Diploma of Employment Services

Diploma of Engineering Technology - Refrigeration
and Air-conditioning

Whole of Economy - Output 2

Tier 4

Diploma

Diploma of English Proficiency
Diploma of Enterprise Architecture Practice
Diploma of Environmental Monitoring and Technology
Diploma of Family Intake and Support Work
Diploma of Financial Markets
Diploma of Financial Planning
Diploma of Food and Wine Management (Acc Course)
Diploma of Food Science and Technology
Diploma of Furniture Design and Technology
Diploma of General Insurance
Diploma of Government
Diploma of Government (Human Resources)
Diploma of Government (Management)
Diploma of Government (Project Management)
Diploma of Industrial Electronics and Control Engineering
Diploma of Instrumentation and Control Engineering
Diploma of Interactive Digital Media
Diploma of Irrigation Management
Diploma of Laboratory Technology
Diploma of Landscape Design
Diploma of Legal Services
Diploma of Leisure and Health
Diploma of Local Government
Diploma of Local Government (Health & Environment)
Diploma of Local Government (Planning)
Diploma of Loss Adjusting
Diploma of Maritime Operations (Marine Engineering Class 3 Near Coastal)
Diploma of Maritime Operations (Master up to 500 GT or Master 80 metres)
Diploma of Maritime Operations (Master up to 80 metres Near Coastal)
Diploma of Motorsport Technology
Diploma of Organic Farming
Diploma of Outdoor Recreation
Diploma of Parks and Gardens Management
Diploma of Pest Management
Diploma of Photo Imaging
Diploma of Plumbing and Services
Diploma of Population Health
Diploma of Pork Production
Diploma of Printing and Graphic Arts
Diploma of Process Plant Technology
Diploma of Property Services (Asset and Facility Management)
Diploma of Public Safety (Community Safety)
Diploma of Public Safety (Emergency Management)
Diploma of Quality Auditing
Diploma of Reflexology
Diploma of Remedial Massage
Diploma of Scenery and Set Construction
Diploma of School Age Education and Care
Diploma of Security and Risk Management
Diploma of Spatial Information Services
Diploma of Specialist Make-up Services

Diploma of Sport Development
Diploma of Surveying
Diploma of Sustainable Operations
Diploma of Systems Analysis and Design
Diploma of Underground Metalliferous Mining Mgt
Diploma of Veterinary Nursing (Emergency & Critical Care)
Diploma of Veterinary Nursing (General Practice)
Diploma of Viticulture
Diploma of Water Operations
Diploma of Well Servicing Operations
Diploma of Youth Justice
Diploma of Youth Work

Certificate IV

Certificate IV in Aboriginal and Torres Strait Islander Mentoring
Certificate IV in Aboriginal and/or Torres Strait Islander Primary Health Care Practice
Certificate IV in Aboriginal or Torres Strait Islander Cultural Arts
Certificate IV in Advanced Baking
Certificate IV in Advanced Jewellery Manufacture
Certificate IV in Advertising
Certificate IV in Agribusiness
Certificate IV in Alcohol and Other Drugs
Certificate IV in Applied Fashion Design and Technology
Certificate IV in Aromatherapy
Certificate IV in Auslan
Certificate IV in Automotive Body Repair Technology
Certificate IV in Automotive Electrical Technology
Certificate IV in Automotive Management
Certificate IV in Automotive Mechanical Diagnosis
Certificate IV in Aviation (Commercial Pilot Aeroplane Licence)
Certificate IV in Ayurvedic Lifestyle Consultation
Certificate IV in Broadcast Technology
Certificate IV in Building and Construction (Trade Contracting)
Certificate IV in Building Design Drafting
Certificate IV in Business (Governance)
Certificate IV in Career Development
Certificate IV in Child, Youth and Family Intervention
Certificate IV in Civil Construction Operations
Certificate IV in Civil Construction Supervision
Certificate IV in Community Development
Certificate IV in Community Recreation
Certificate IV in Companion Animal Services
Certificate IV in Conservation and Land Management
Certificate IV in Correctional Practice
Certificate IV in Costume for Performance
Certificate IV in Credit Management
Certificate IV in Custom-made Footwear
Certificate IV in Dance
Certificate IV in Dental Assisting
Certificate IV in Design
Certificate IV in Digital and Interactive Games

Whole of Economy - Output 2

Tier 4

Certificate IV

Certificate IV in Digital Media Technologies
Certificate IV in Drilling Oil & Gas (On shore)
Certificate IV in Driving Operations
Certificate IV in Education Support
Certificate IV in Electrical - Air-conditioning Split Systems
Certificate IV in Electrical - Fire Protection Control Systems
Certificate IV in Electronics and Communications
Certificate IV in Employment Services
Certificate IV in Energy Management and Control
Certificate IV in Engineering Drafting
Certificate IV in Environmental Monitoring & Technology
Certificate IV in ePublishing
Certificate IV in ESI - Network Systems
Certificate IV in ESI - Power Systems Substations
Certificate IV in Fitness
Certificate IV in Funeral Services
Certificate IV in Gas Supply Industry Operations
Certificate IV in General Insurance
Certificate IV in Government
Certificate IV in Government (Court Services)
Certificate IV in Government (Investigation)
Certificate IV in Government (Procurement and Contracting)
Certificate IV in Government (Project Management)
Certificate IV in Government (Statutory Compliance)
Certificate IV in Guiding
Certificate IV in Home Sustainability Assessment
Certificate IV in Hyperbaric Operations (Acc Course)
Certificate IV in Hyperbaric Operations (Diver Medical Technician) (Accredited Course)
Certificate IV in Indigenous Leadership
Certificate IV in Interactive Digital Media
Certificate IV in Irrigation
Certificate IV in Laboratory Techniques
Certificate IV in Large Scale Wind Generation - Electrical
Certificate IV in Legal Services
Certificate IV in Local Government (Health & Environment)
Certificate IV in Local Government (Land Management)
Certificate IV in Local Government (Planning)
Certificate IV in Make-up
Certificate IV in Massage Therapy Practice
Certificate IV in Meat Processing (General)
Certificate IV in Medical Practice Assisting
Certificate IV in Mind Body Medicine
Certificate IV in Mobile Crane Operations
Certificate IV in Motorsport Technology
Certificate IV in Music
Certificate IV in Operating Theatre Technical Support
Certificate IV in Outdoor Recreation
Certificate IV in Pastoral Care
Certificate IV in Pathology
Certificate IV in Pharmaceutical Manufacturing
Certificate IV in Policing (Accredited Course)

Certificate IV

Certificate IV in Process Plant Technology
Certificate IV in Property Services (Operations)
Certificate IV in Public Safety (Leadership)
Certificate IV in Rail Safety Management
Certificate IV in Recreational Vehicles
Certificate IV in Residential Drafting (Accredited Course)
Certificate IV in School Age Education and Care
Certificate IV in Screen and Media
Certificate IV in Security and Risk Management
Certificate IV in Social Housing
Certificate IV in Spatial Information Services
Certificate IV in Sport Coaching
Certificate IV in Sterilisation Services
Certificate IV in Stevedoring Operations
Certificate IV in Surveying
Certificate IV in Sustainable Operations
Certificate IV in Systems Analysis and Design
Certificate IV in Telecommunications Network Engineering
Certificate IV in Traffic Operations
Certificate IV in Travel and Tourism
Certificate IV in Vehicle Loss Assessing
Certificate IV in Veterinary Nursing
Certificate IV in Volunteer Program Coordination
Certificate IV in Well Servicing Operations
Certificate IV in Women's Education
Certificate IV in Youth Justice

Certificate III

Certificate III in Aboriginal and/or Torres Strait Islander Primary Health Care
Certificate III in Agriculture (Dairy Production)
Certificate III in Animal Studies
Certificate III in Animal Technology
Certificate III in Applied Fashion Design & Technology
Certificate III in Arboriculture
Certificate III in Automotive Administration
Certificate III in Automotive and Marine Trimming Technology
Certificate III in Automotive Drivetrain Technology
Certificate III in Automotive Glazing Technology
Certificate III in Automotive Underbody Technology
Certificate III in Bicycle Workshop Operations
Certificate III in Boating Services
Certificate III in Broadcast Technology
Certificate III in Business Administration (Legal)
Certificate III in Business Administration (Medical)
Certificate III in Business to Business Sales
Certificate III in Captive Animals
Certificate III in Cemetery and Crematorium Operations
Certificate III in Cleaning Operations
Certificate III in Clothing Production
Certificate III in Commercial Seed Processing
Certificate III in Community Activity Programs
Certificate III in Companion Animal Services
Certificate III in Computer Systems Equipment

Whole of Economy - Output 2

Tier 4

Certificate III

Certificate III in Construction Crane Operations	Certificate III in Outdoor Power Equipment Technology
Certificate III in Construction Waterproofing	Certificate III in Parks and Gardens
Certificate III in Correctional Practice	Certificate III in Pathology
Certificate III in Demolition	Certificate III in Pest Management
Certificate III in Dental Assisting	Certificate III in Pharmaceutical Manufacturing
Certificate III in Dental Laboratory Assisting	Certificate III in Plumbing (Mechanical Services)
Certificate III in Design Fundamentals	Certificate III in Police Studies (Accredited Course)
Certificate III in Diesel Fuel Technology	Certificate III in Polymer Processing
Certificate III in Education Support	Certificate III in Population Health
Certificate III in Electric Passenger Train Guard	Certificate III in Pork Production
Certificate III in Electrical Fitting	Certificate III in Poultry Production
Certificate III in Electronics and Communications	Certificate III in Printing and Graphic Arts (Graphic Design Production)
Certificate III in Employment Services	Certificate III in Printing and Graphic Arts (Ink Manufacture)
Certificate III in Engineering (Service Technician Portable Fire Equipment - Chubb)	Certificate III in Printing and Graphic Arts (Multimedia)
Certificate III in ESI - Power Systems - Distribution Cable Jointing	Certificate III in Printing and Graphic Arts (Screen Printing)
Certificate III in Farriery	Certificate III in Process Plant Operations
Certificate III in Floristry	Certificate III in Property Services (Operations)
Certificate III in Food Processing (Sales)	Certificate III in Public Safety (Firefighting and Emergency Operations)
Certificate III in Footwear Production	Certificate III in Rail Customer Service
Certificate III in Forklift Technology	Certificate III in Rail Signalling
Certificate III in Funeral Operations	Certificate III in Recreational Vehicle Manufacture
Certificate III in Furniture Finishing	Certificate III in Recreational Vehicle Service and Repair
Certificate III in General Education for Adults	Certificate III in Renewable Energy - ELV
Certificate III in Glass and Glazing	Certificate III in Rigging
Certificate III in Gravedigging	Certificate III in Scaffolding
Certificate III in Guiding	Certificate III in Scenery and Set Construction
Certificate III in Heavy Commercial Trailer Technology	Certificate III in Security Equipment
Certificate III in Heavy Commercial Vehicle Mechanical Technology	Certificate III in Security Operations
Certificate III in Indigenous Cultural Heritage Assessment (Indigenous Archaeological Foundations)	Certificate III in Signage
Certificate III in Indigenous Land Management	Certificate III in Social Housing
Certificate III in International Trade	Certificate III in Soft Furnishing
Certificate III in Jewellery Manufacture	Certificate III in Sport and Recreation
Certificate III in Laboratory Skills	Certificate III in Sport Career Oriented Participation
Certificate III in Landscape Construction	Certificate III in Sports Turf Management
Certificate III in Local Government (Health and Environment)	Certificate III in Stonemasonry (Monumental/Installation)
Certificate III in Locksmithing	Certificate III in Sugar Milling Industry Operations
Certificate III in Manufacturing Technology	Certificate III in Surface Preparation and Coating Application
Certificate III in Marine Technology	Certificate III in Surveying and Spatial Information Services
Certificate III in Maritime Operations	Certificate III in Telecommunications
Certificate III in Maritime Operations (Integrated Rating)	Certificate III in Telecommunications Cabling
Certificate III in Meat Processing (Rendering)	Certificate III in Telecommunications Fixed Wireless Installation
Certificate III in Meat Processing (Retail Butcher)	Certificate III in Terminal Train Driving
Certificate III in Media	Certificate III in Timber and Composites Machining
Certificate III in Mercantile Agents	Certificate III in Timber Merchandising
Certificate III in Mobile Crane Operations	Certificate III in Travel
Certificate III in Motorcycle Mechanical Technology	Certificate III in Upholstery
Certificate III in Music	Certificate III in Vertebrate Pest Management
Certificate III in Non-Emergency Client Transport	Certificate III in Watch and Clock Service and Repair
Certificate III in Nutrition and Dietetic Assistance	Certificate III in Weed Management
Certificate III in Outdoor Power Equipment	Certificate III in Well Servicing Operations
	Certificate III in Women's Education

Whole of Economy - Output 2

Tier 4

Certificate II

Certificate II in Aboriginal and/or Torres Strait Islander Primary Health Care
Certificate II in Active Volunteering
Certificate II in Aeroskills
Certificate II in Animal Studies
Certificate II in Applied Fashion Design & Technology
Certificate II in Asian Cookery
Certificate II in Auslan
Certificate II in Automotive Administration
Certificate II in Automotive Air Conditioning Technology
Certificate II in Automotive Body Repair Technology
Certificate II in Automotive Braking System Technology
Certificate II in Automotive Cooling System Technology
Certificate II in Automotive Driveline System Technology
Certificate II in Automotive Steering and Suspension System Technology
Certificate II in Automotive Studies (Pre-vocational)
Certificate II in Automotive Underbody Technology
Certificate II in Automotive Vocational Preparation
Certificate II in Automotive/Metal Fabrication (Pre-Vocational)
Certificate II in Bicycle Mechanical Technology
Certificate II in Boating Services
Certificate II in Cleaning Operations
Certificate II in Community Activities
Certificate II in Competitive Systems and Practices
Certificate II in Conservation and Land Management
Certificate II in Creative Industries (Media)
Certificate II in Data and Voice Communications
Certificate II in Drainage
Certificate II in Dry Cleaning Operations
Certificate II in Electrotechnology Studies (Pre-vocational)
Certificate II in Engineering (Service Technician Portable Fire Equipment - Chubb)
Certificate II in Engineering Pathways
Certificate II in ESI - Asset Inspection
Certificate II in ESI - Powerline Vegetation Control
Certificate II in Fire Alarms Servicing
Certificate II in Food Processing (Sales)
Certificate II in Furniture Finishing
Certificate II in Furniture Making
Certificate II in Government
Certificate II in Indigenous Leadership
Certificate II in Information and Cultural Services
Certificate II in Landscaping
Certificate II in Laundry Operations
Certificate II in Manufactured Mineral Products
Certificate II in Meat Processing (Meat Retailing)
Certificate II in Millinery
Certificate II in Music
Certificate II in National Broadband Network Cabling (Electricity Supply Industry Assets)
Certificate II in National Broadband Network Construction
Certificate II in Outdoor Power Equipment Technology

Certificate II in Parks and Gardens
Certificate II in Pharmaceutical Manufacturing
Certificate II in Population Health
Certificate II in Printing and Graphic Arts (General)
Certificate II in Process Plant Operations
Certificate II in Production Nursery
Certificate II in Public Safety (Firefighting and Emergency Operations)
Certificate II in Rail Customer Service
Certificate II in Remote Construction Maintenance
Certificate II in Resource Processing
Certificate II in Retail Baking Assistance
Certificate II in Retail Nursery
Certificate II in Sampling and Measurement
Certificate II in Security Assembly and Set-up
Certificate II in Security Operations
Certificate II in Shunting
Certificate II in Split Air-conditioning and Heat Pump Systems
Certificate II in Sport and Recreation
Certificate II in Sport Coaching
Certificate II in Sports Turf Management
Certificate II in Stevedoring
Certificate II in Sugar Milling Industry Operations
Certificate II in Surveying and Spatial Information Services
Certificate II in Technical Security
Certificate II in Technical Support
Certificate II in Telecommunications
Certificate II in Telecommunications Cabling
Certificate II in Telecommunications Digital Reception Technology
Certificate II in Tourism
Certificate II in Underground Coal Mining
Certificate II in Well Servicing Operations

Certificate I

Certificate I in Active Volunteering
Certificate I in Agri-Food (Pathways)
Certificate I in Animal Studies
Certificate I in Automotive Manufacturing
Certificate I in Automotive Vocational Preparation
Certificate I in Business
Certificate I in Conservation and Land Management
Certificate I in Creative Industries
Certificate I in ElectroComms Skills
Certificate I in Food Processing
Certificate I in Furnishing
Certificate I in Maritime Operations (General Purpose Hand Near Coastal)
Certificate I in Process Manufacturing
Certificate I in Resources and Infrastructure Operations
Certificate I in Sport and Recreation
Certificate I in Textiles Clothing and Footwear

Whole of Economy - Output 2

Tier 4

Skill Sets

Skill Set (AHC) - Advanced Chemical Spray Application Skill Set	Skill Set (CHC) - Basic foot care skill set - community services focus
Skill Set (AHC) - Agricultural Chemical Skill Set	Skill Set (CHC) - Basic foot care skill set - health focus
Skill Set (AHC) - Carbon Farming Initiative Advisor Skill Set	Skill Set (CHC) - Case management skill set
Skill Set (AHC) - Carbon Farming Initiative Business Skill Set	Skill Set (CHC) - Chronic disease self mgt skill set
Skill Set (AHC) - Carbon Farming Initiative Soil or Biochar Project Implementer Skill Set	Skill Set (CHC) - Client-oriented service delivery skill set
Skill Set (AHC) - Carbon Farming Initiative Vegetation Project Implementer Skill Set	Skill Set (CHC) - Community sector team leadership skill set
Skill Set (AHC) - Carbon Farming Initiative Waste and Manure Mgt Project Implementer Skill Set	Skill Set (CHC) - Dementia support skill set - planning and coordination
Skill Set (AHC) - Farm Business Management Skill Set	Skill Set (CHC) - Dementia support skill set - service delivery
Skill Set (AHC) - Irrigation Agronomist Skill Set	Skill Set (CHC) - Disability work skill set - active support of clients with a disability
Skill Set (AHC) - Irrigation Manager Skill Set	Skill Set (CHC) - Disability work skill set - behaviour support
Skill Set (AHC) - Recognise Aboriginal Cultural Sites Skill Set	Skill Set (CHC) - Disability work skill set - disability support in employment
Skill Set (AUR) - Advanced Body Repair Skill Set	Skill Set (CHC) - Early childhood skill set
Skill Set (AUR) - Advanced Body Repair Welding Skill Set	Skill Set (CHC) - Education support work skill set
Skill Set (AUR) - Advanced Vehicle Refinishing Skill Set	Skill Set (CHC) - Family support services work skill set coordination
Skill Set (AUR) - Battery Electric Vehicle Diagnosis & Repair Skill Set	Skill Set (CHC) - Family support services work skill set provide support
Skill Set (AUR) - Battery Electric Vehicle Inspection & Servicing Skill Set	Skill Set (CHC) - Financial literacy education skill set
Skill Set (AUR) - Hybrid Electric Vehicle Inspection & Servicing Skill Set	Skill Set (CHC) - High support and complex care skill set aged care
Skill Set (AUR) - Vehicle Air Conditioning Service, `Retrofit, and Repair Skill Set	Skill Set (CHC) - Leisure and recreation skill set - planning and delivery
Skill Set (AUR) - Vehicle Refrigerant Recovery Skill Set	Skill Set (CHC) - Leisure and recreation skill set - program support
Skill Set (AVI) - Aerobatic Pilot Skill Set	Skill Set (CHC) - Literacy tutor skill set
Skill Set (AVI) - Aviation Operator Skill Set	Skill Set (CHC) - Medication assistance skill set
Skill Set (BSB) - Aspiring Supervisor Skill Set	Skill Set (CHC) - Mental health skill set - including recognise individuals at risk
Skill Set (BSB) - Cloud Computing and Digital Skills for Business Skill Set	Skill Set (CHC) - Oral health care skill set - to work with Aboriginal and/or Torres Strait Islander people
Skill Set (BSB) - Copyright Skill Set	Skill Set (CHC) - Palliative approach skill set - plan and provide care
Skill Set (BSB) - Design Fundamentals Skill Set	Skill Set (CHC) - Problem gambling skill set
Skill Set (BSB) - Governance Induction Skill Set	Skill Set (CHC) - Quality systems skill set for aged and community care sector
Skill Set (BSB) - Innovation Leadership Skill Set	Skill Set (CHC) - Working with families skill set
Skill Set (BSB) - Intellectual Property Strategic Management Skill Set	Skill Set (CPC) - Lead a building, construction or plumbing and services team
Skill Set (BSB) - Key Management Skill Set	Skill Set (CPP) - Perform Applied Engineering Surveying Skill Set
Skill Set (BSB) - Managing Innovation Skill Set	Skill Set (CPP) - Perform Basic Spatial Drafting Skill Set
Skill Set (BSB) - Service Management Skill Set	Skill Set (CPP) - Perform Monitoring Centre Operations Skill Set
Skill Set (BSB) - Small Business ATSI Corporate Governance Skill Set	Skill Set (CUA) - Sound Skill Set
Skill Set (BSB) - Small Business Contracting Skill Set	Skill Set (CUA) - Vision Systems Skill Set
Skill Set (BSB) - Team Leader Skill Set	Skill Set (CUF07) - Community Broadcasting Administration Skill Set
Skill Set (BSB) - Trade Mark Skill Set	Skill Set (CUL) - Deliver Public Programs Skill Set
Skill Set (BSB) - Workforce Development Implementation Skill Set	Skill Set (CUL) - Manage Collections Skill Set
Skill Set (BSB) - Workforce Planning and Development Skill Set	Skill Set (CUL) - Organise and Access Collections Skill Set
Skill Set (CHC) - Assessment, Carer Support and Respite Coordination skill set	

Whole of Economy - Output 2

Tier 4

Skill Sets

Skill Set (CUL) - Prepare Exhibitions Skill Set	Skill Set (MAR) - Marine Radio Operator's VHF and HF Skill Set
Skill Set (CUL) - Preventive Preservation & Conservation Skill Set	Skill Set (MAR) - Transmit and receive information by marine radio
Skill Set (CUV) - Preparatory Skill Set for Professional Graphic Design Practice	Skill Set (MSA) - Confined space work team
Skill Set (CUV) - Preparatory Skill Set for Professional Photo Imaging Practice	Skill Set (MSA) - High pressure water jetting operator
Skill Set (FDF) - Cellar Door Sales Induction	Skill Set (MSA) - Leading Hand/Supervisor
Skill Set (FDF) - Cellar Hand Induction	Skill Set (MSA) - License to operate a standard boiler
Skill Set (FDF) - Chemical Handling Certification	Skill Set (MSA) - License to operate an advanced boiler
Skill Set (FDF) - Confined Space	Skill Set (MSA) - Trade Measurement Verification (Complex Measuring Instrument)
Skill Set (FDF) - Food Safety	Skill Set (MSA) - Trade Measurement Verification (Limited Weighing Instrument)
Skill Set (FDF) - Forklift Operations	Skill Set (MTM) - Carcase Trimming (Specifications Trim - Knife) Skill Set
Skill Set (FDF) - Hand Pruning Induction	Skill Set (MTM) - Meat Packer (Boning Room) Skill Set
Skill Set (FDF) - Irrigation	Skill Set (MTM) - Transport Livestock Skill Set
Skill Set (FDF) - Manual Handling	Skill Set (RII) - Work Zone Traffic Control - Supervisor Skill Set
Skill Set (FDF) - Risk Management	Skill Set (RII) - Work Zone Traffic Control - Traffic Controller Skill Set
Skill Set (FDF) - Trellis Management	Skill Set (RII) - Work Zone Traffic Control Guidance Plan
Skill Set (FDF) - Wine Evaluation	Skill Set (SIF) - Safe Exhumation of Burial Sites
Skill Set (HLT) - Aboriginal and/or Torres Strait Islander Aged Care Skill Set	Skill Set (SIF) - Safe Gravedigging
Skill Set (HLT) - Aboriginal and/or Torres Strait Islander Family Health Skill Set	Skill Set (SIR) - Coaching and Mentoring
Skill Set (HLT) - Allied health assistance - community rehabilitation skill set	Skill Set (SIR) - Human Resources Management
Skill Set (HLT) - Allied health assistance - nutrition & dietetics skill set	Skill Set (SIR) - Management
Skill Set (HLT) - Allied health assistance - occupational therapy skill set	Skill Set (SIR) - Marketing
Skill Set (HLT) - Allied health assistance - physiotherapy skill set	Skill Set (SIR) - Sales
Skill Set (HLT) - Allied health assistance - speech pathology skill set	Skill Set (SIR) - Stock Control
Skill Set (HLT) - Client safety skill set	Skill Set (SIS) - Abseiling Instructor Single Pitch (Artificial Surfaces)
Skill Set (HLT) - Food safety supervision skill set - for community services and health industries	Skill Set (SIS) - Abseiling Instructor Single Pitch (Natural Surfaces)
Skill Set (HLT) - Infection control skill set	Skill Set (SIS) - Bushwalking Guide Uncontrolled Environment
Skill Set (HLT) - Oral health care skill set - personal client support (community services)	Skill Set (SIS) - Climbing Instructor (Artificial Surfaces) Top Rope
Skill Set (HLT) - Oral health care skill set - personal client support (health)	Skill Set (SIS) - Mountain Bike Instructor (Intermediate Environment)
Skill Set (HLT) - Oral health care skill set - to work with aged care clients	Skill Set (SIT) - Customer Service
Skill Set (ICT) - Application Development Specialist Skill Set	Skill Set (SIT) - Essential Business Skills for a Restaurant Manager
Skill Set (ICT) - Basic Application Development Programmer Skill Set	Skill Set (SIT) - Mentoring and Supervision
Skill Set (ICT) - Basic Open Cabler Registration Skill Set	Skill Set (SIT) - Product Sales for International Markets
Skill Set (ICT) - Certified Technician or Technology Specialist - Infrastructure Configuration Skill Set	Skill Set (SIT) - Sommelier
Skill Set (ICT) - National Broadband Network Advanced Linesworker/Installer Skill Set	Skill Set (SIT) - Visitor Information Services
Skill Set (ICT) - Wireless LAN and IP Network installation Skill Set	Skill Set (SIT, FDF) - Responsible Service of Alcohol
Skill Set (MAR) - Fast Rescue Craft Operations Skill Set	Skill Set (TAE) - Address Foundation Skills in Vocational Practice Skill Set
	Skill Set (TAE) - Assessor Skill Set
	Skill Set (TAE) - Enterprise and Industry Engagement Skill Set
	Skill Set (TAE) - Enterprise Trainer - Mentoring Skill Set
	Skill Set (TAE) - Enterprise Trainer - Presenting Skill Set
	Skill Set (TAE) - Enterprise trainer and assessor Skill Set

Whole of Economy - Output 2

Tier 4

Skill Sets

Skill Set (TAE) - Workplace supervisor	Skill Set (UET) - Refresher - Apply ESI Safety Rules, Codes of Practice and Procedures for Work On or Near Electrical Apparatus
Skill Set (TLI) - Access and Move a Track Vehicle Within a Defined Worksite Skill Set	Skill Set (UET) - Refresher - Perform Tower Rescue and Provide First Aid
Skill Set (TLI) - Accessing the Rail Corridor Skill Set	Skill Set (UET) - Refresher - Testing of connections to low voltage electricity networks
Skill Set (TLI) - Control Rail Traffic Through Worksite Skill Set	Unit of Competency (TLI) - Licence to operate a boom-type elevating work platform (boom length 11 metres or more)
Skill Set (TLI) - Coordinate Multiple Work Groups Skill Set	Unit of Competency (TLI) - Licence to operate a forklift truck
Skill Set (TLI) - Furniture Removal Pre-Packer Skill Set	Course in Aboriginal Cultural Education
Skill Set (TLI) - Furniture Removal Team Leader Skill Set	Course in Certified Infant Massage Instruction
Skill Set (TLI) - Handsignaller Skill Set	Course in Electrician - Minimum Australian Context Gap
Skill Set (TLI) - Integrated Logistics Support Inventory Controller Skill Set	Course in Indigenous Mentoring
Skill Set (TLI) - Integrated Logistics Support Mgt Skill Set	Course in Preliminary Spoken and Written English
Skill Set (TLI) - Introduction to the Waste Industry Skill Set	
Skill Set (TLI) - Logistics Inventory Controller Skill Set	
Skill Set (TLI) - Mentoring Skill Set	
Skill Set (TLI) - Mobile Crane Operations Supervisor Skill Set	
Skill Set (TLI) - Rail Operations Safeworking Skill Set	
Skill Set (TLI) - Road Safety Skill Set	
Skill Set (TLI) - Stevedoring Crane Operations Skill Set	
Skill Set (TLI) - Stevedoring Reefer Skill Set	
Skill Set (TLI) - Stevedoring Ship Mounted Crane Operations Skill Set	
Skill Set (TLI) - Stevedoring Team Leader Skill Set	
Skill Set (UEE) - Commissioning and Servicing	
Skill Set (UEE) - Data Communications - ACMA 'Open' Cabling Provider	
Skill Set (UEE) - Data Communications - ACMA Restricted Telecommunications Cabling Registration	
Skill Set (UEE) - Data Communications - Install and Modify Performance Data Communication Optical Fibre Cabling	
Skill Set (UEE) - Data Communications - Install and Modify Performance Data Communication Structured Cabling	
Skill Set (UEE) - Data Communications - Install Below Ground Communication Cables	
Skill Set (UEE) - Data Communications - Premises Cabling for NBN Rollout	
Skill Set (UEE) - Refrigeration-Air Conditioning - Design Hydrocarbon Refrigeration Systems	
Skill Set (UEE) - Refrigeration-Air Conditioning - Install and Commission Hydrocarbon Refrigeration Systems	
Skill Set (UEE) - Refrigeration-Air Conditioning - Service and Repair Hydrocarbon Refrigeration and Air Conditioning Systems	
Skill Set (UEE) - Sustainable - Designer of Grid Connected Photovoltaic Systems	
Skill Set (UEE) - Sustainable - Designer-Installer of Grid Connected Photovoltaic Systems	
Skill Set (UEE) - Sustainable - Installer of Grid Connected Photovoltaic Systems	
Skill Set (UET) - Apply Access Procedures to Work On or Near Electrical Network Infrastructure	



INDUSTRY PROFILES



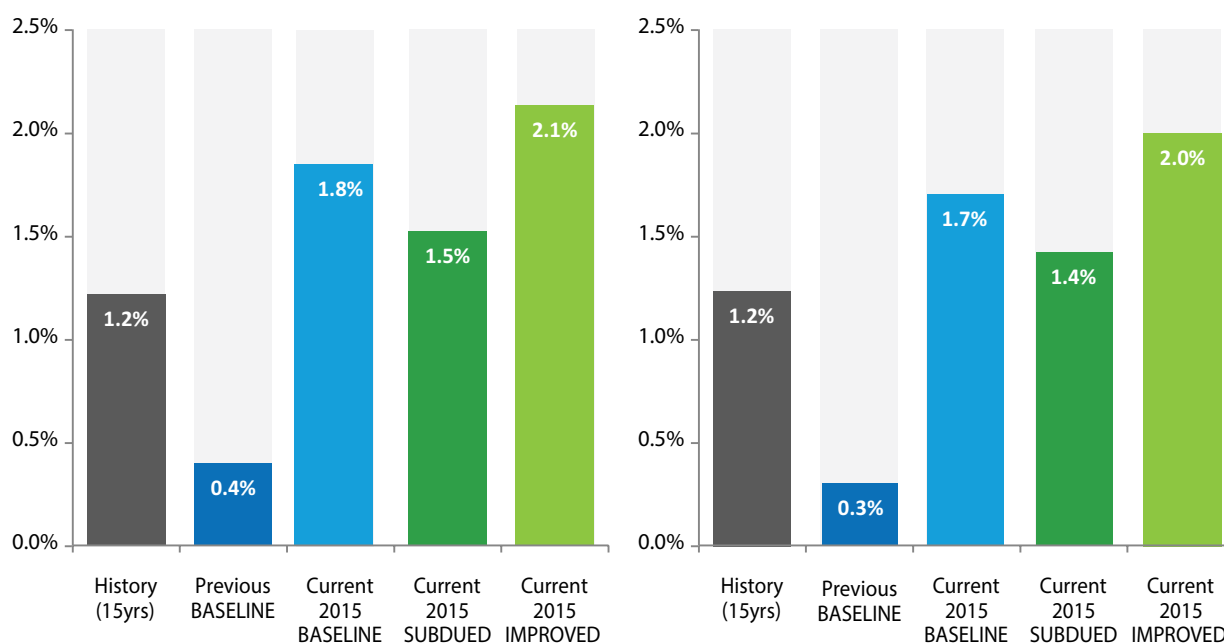
7.1 Accommodation and Food Services

Employment Outlook

According to the Commission's interim modelling, employment in the Accommodation and Food Services industry is projected to increase 1.8 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 1.2 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth above the state average. As a result, its share of the State's employment is projected to rise from 6.6 percent to 7.1 percent.

**Figure 8 - Accommodation & Food Services, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

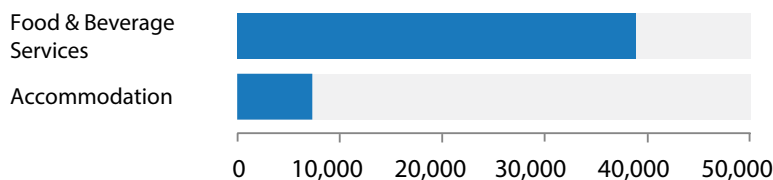
Industry Outlook

Accommodation and Food Services underpin tourism, travel and hospitality and are important contributors to South Australia's economy.

The Industry has experienced strong employment growth over the last twenty years largely driven by strong growth in the Cafes, Restaurants and Takeaway Food sector.¹ For the year ending June 2015, despite 6.6 percent growth in the number of visitors and 8.2 percent growth in accommodation nights in Australia, South Australia experienced a 0.7 percent decline in visitors and a 4.9 percent decline in accommodation nights.² Visitors from Asia and China make up the biggest proportion of International visitors, closely followed by Europe.³

While the number of International seats into Adelaide declined between September 2014 and June 2015 by 1,000, domestic seats increased for the same period from 76,000 to 84,000. Recent announcements from International airlines regarding additional services into Adelaide are encouraging, and further growth is expected on the back of a weaker Australia dollar. There was a slight increase in the number of people employed in the tourism sector, rising from 31,000 to 32,000 during the same period.⁴⁵

Figure 9 - Accommodation & Food Services, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

1 - <https://cica.org.au/wp-content/uploads/2014-Accommodation-and-Food-Services-Industry-Outlook.pdf>

2 - http://tourism.sa.gov.au/assets/documents/IVS_Summary_Jun_15.pdf

3 - *ibid*

4 - [http://tourism.sa.gov.au/assets/documents/At_A_Glance_June_15\(2\).pdf](http://tourism.sa.gov.au/assets/documents/At_A_Glance_June_15(2).pdf)

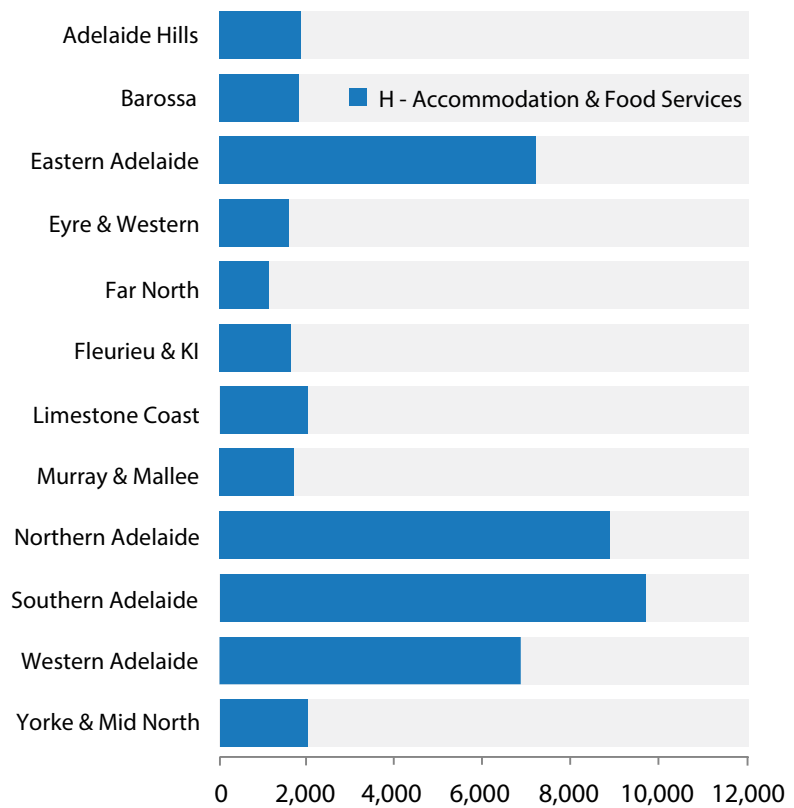
5 - http://tourism.sa.gov.au/assets/documents/SATC_infogram_2_pager_S14.pdf

Building on evidence that 40 percent of all International visitors visited a National park in Australia during 2013-14, there is an action plan being developed for nature based tourism which should see new jobs created.⁶

Hospitality in health care is growing as South Australia's population ages and demand for home support services increases. The ageing population also brings opportunities for new products and services and domestic tourism for those with disposable incomes.

Digital disruption is impacting on businesses that are now part of a world online. The use of websites, e-newsletters and social media enable a wider marketing reach and encourage repeat business. This can be challenging for small and micro-businesses employing less than five employees, which generally dominate this industry.

Figure 10 - Accommodation & Food Services, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

⁶ - <http://yoursay.sa.gov.au/decisions/nature-based-tourism/about>

Skills needs

Survey respondents ranked the Sales and Customer Service skills cluster as having the highest importance, followed by the Managerial and Leadership and then the Work Health and Safety (WHS) skills clusters.

Entrepreneurial and Language, Literacy and Numeracy (LLN) skills clusters were ranked of lowest importance by the Accommodation and Food Services Survey respondents.

Table 3 - Accommodation & Food Services, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Sales & Customer Service	1	2	↑
Managerial & Leadership	2	1	↓
Work Health & Safety (WHS)	3	4	↑
Marketing & Engagement	4	7	↑
Sustainability & Environmental	5	9	↑
Human Resources	6	8	↑
Financial	7	6	↓
Information & Technology	8	3	↓
Administration & Support	9	5	↓
Language, Literacy & Numeracy (LLN)	10	10	↔
Entrepreneurial	11	11	↔

Workforce development themes and issues

Customer service is paramount in this industry and intrinsically linked to a skilled workforce. The majority of businesses feel that workforce issues are affecting the performance of their business and will continue to do so.⁷

The workforce is made up of two distinct groups of workers, those with specialised skills and long-term career prospects such as Chefs, Café and Restaurant Managers and a high proportion of part-time and casual workers, such as waiters and kitchenhands that meet the industry's need for flexibility and address the seasonal nature of work in the Industry.

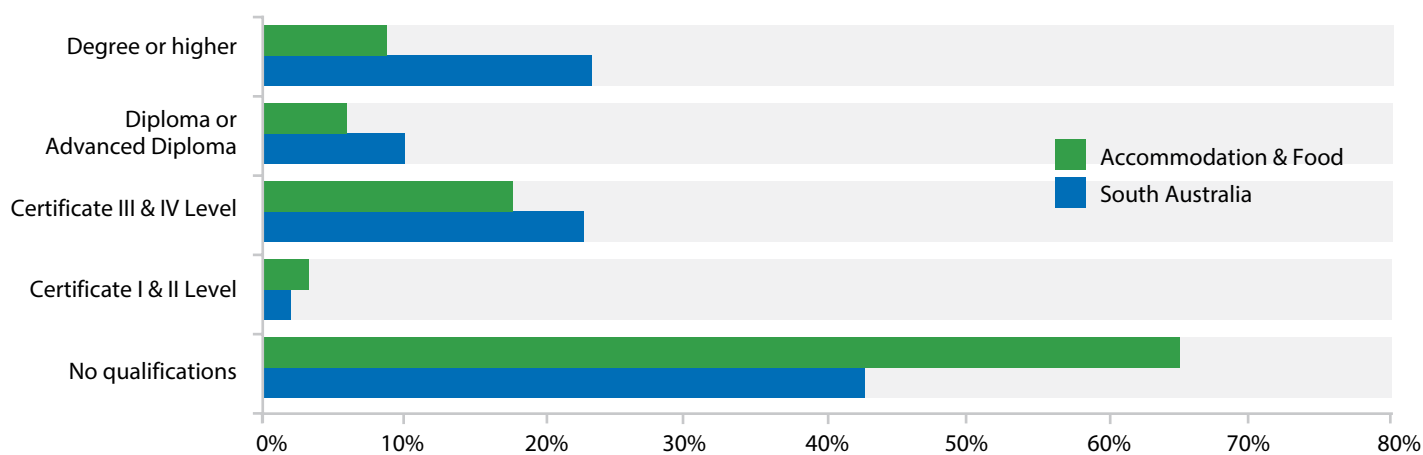
Attraction of staff remains an issue with perceptions of low skilled jobs and limited career prospects making both attraction and retention of staff more challenging. This is reflected in the age profile of the workforce with the median age for Accommodation and Food Services workforce being 27 years. This sector has the lowest median age workforce of all industry sectors. By contrast, 2 percent of the workers are aged 45 to 64, which is significantly lower than the State (35.5 percent).⁸

Employers in this sector are looking for the right attitude as well as skills in problem solving and decision making. Opportunities may exist for employers to recruit people who want to return to work, such as parents and people with disabilities, who may have the skills and life experience they seek. Pre-employment training and a training model for casual workers based on number of hours worked may address the time and cost constraints on small business to provide on-the-job training.

⁷ - <https://www.serviceskills.com.au/sites/default/files/files/Environmentalpercent20Scans/2015-SSA-Escan-TTH.pdf>

⁸ - <https://cica.org.au/wp-content/uploads/2014-Accommodation-and-Food-Services-Industry-Outlook.pdf>

Figure 11 - Accommodation & Food Services, Employment Share by Post-School Qualification



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Industry Priority Qualifications

Consumers are using the internet to undertake research, make bookings and share their experiences. Therefore, businesses need to hire staff with technology skills to use websites, manage social media, and write and curate content. A globally connected world increases both opportunity and competition. Training in customer service and cultural awareness will assist staff to meet the expectations of International visitors and domestic travellers.

Employers continue to be concerned about the competence of graduates with formal qualifications, and in some cases with the skills developed, which may be beneficial to the learner in the future, but not of relevance in the short-term.

The Accommodation and Food Services industry received a total of 21 responses to the IPQ Survey. This was below the target number of responses, however the distribution among sub-sectors and organisation types was satisfactory, and the sector had strong stakeholder representation.

The overwhelming majority of employers in this Industry were small to medium size enterprises, and reported moderate expected growth to their number of employees.

Stakeholders were generally pleased with the raw results from the Survey, with very few moderations made.

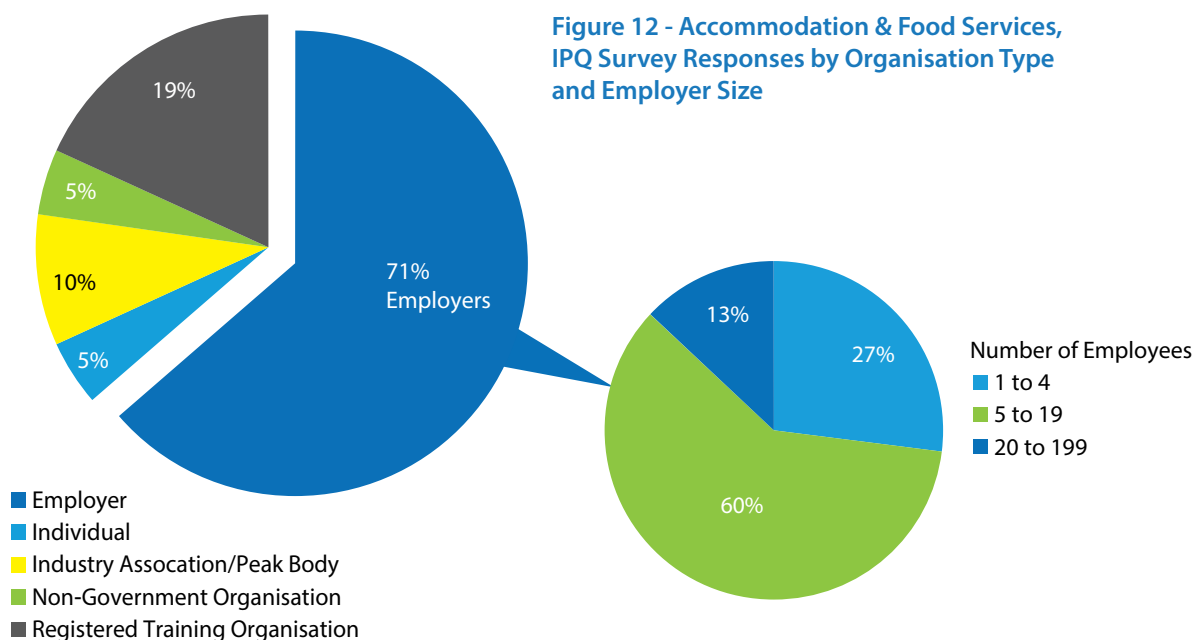


Table 4 - Accommodation & Food Services, Prioritised Qualifications

Accommodation & Food Services

Tier 1 (Highest Priority)	Tier 3 (Priority)
Certificate III in Commercial Cookery Certificate III in Hospitality Certificate II in Kitchen Operations	Advanced Diploma of Hospitality Diploma of Business Diploma of Holiday Parks and Resorts Diploma of Travel and Tourism Certificate IV in Business Administration Certificate IV in Business Sales Certificate IV in Holiday Parks and Resorts Certificate IV in Leadership and Management Certificate IV in Marketing Certificate IV in Patisserie Certificate IV in Small Business Management Certificate III in Business Administration Certificate III in Holiday Parks and Resorts Certificate III in Patisserie Certificate III in Tourism Certificate II in Holiday Parks and Resorts Certificate I in Hospitality Skill Set (SIT) - Food Safety Supervision Skill Set (SIT) - Responsible Service of Alcohol
Tier 2 (High Priority)	
Diploma of Hospitality Certificate IV in Commercial Cookery Certificate IV in Hospitality Certificate III in Catering Operations Certificate II in Hospitality	

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au



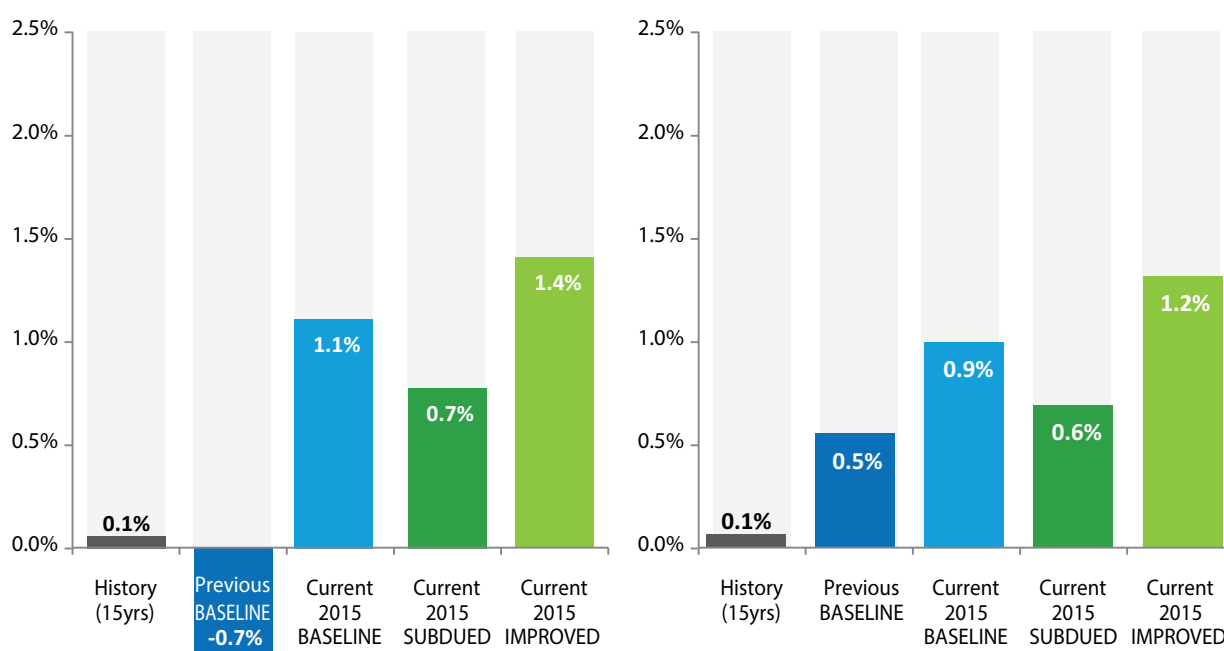
7.2 Administrative and Support Services

Employment Outlook

According to the Commission's interim modelling, employment in the Administrative and Support Services industry is projected to increase 1.1 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 0.1 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth around the state average. As a result, its share of the State's employment is projected to remain around 3.3 percent.

**Figure 13 - Administrative & Support Services, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

The Administrative and Support Services Industry includes those engaged in performing routine support activities for the day-to-day operations of other businesses or organisations.

The Administration and Support Services Industry includes:

- employment services
- travel agency services
- tour arrangement services
- administrative services
- building cleaning
- pest control
- gardening services
- packaging services; and
- support activities for day-to-day operations of other businesses or organisations.

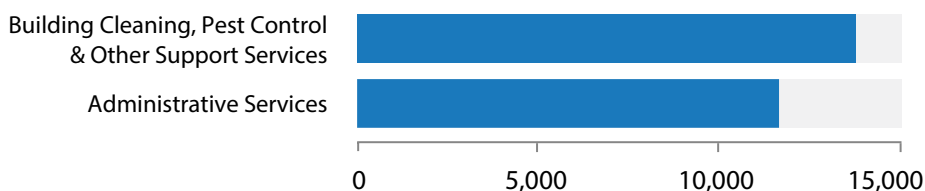
Employment numbers have shown a decline over the last five years of 2.9 percent, which could be explained by the large number of small contractors and franchise operators, but overall employment is consistent with South Australia's share of total employment.⁹

These services are found in all sectors of the economy with recent trends towards outsourcing becoming more common. Organisations in the Administrative and Support Services Industry range from small and micro-businesses through to large service providers.

Cleaners make up the largest employment category, with commercial cleaners dominated by female workers and carpet cleaning dominated by males. However, there are a relatively low proportion of women in management positions. Less than half the workers are full-time and post-secondary education is not common. Cleaning services is largely driven by commercial construction, which has contracted in South Australia but opportunities in home care are likely to increase, although the mandatory security clearances for care workers may impact on what is generally regarded as an unregulated industry sector.

Pest control is a growing sector driven by continued growth in house numbers and demand from commercial organisations, industry and Government. Data for the pest control sector is often bundled with the cleaning, catering and security sectors.

Figure 14 - Administrative & Support Services, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Employment for this sector is seasonal, and is predominantly comprised of male workers, with 73.2 percent employed on a full-time basis.

Industry regulation and licensing, which is often inconsistent between

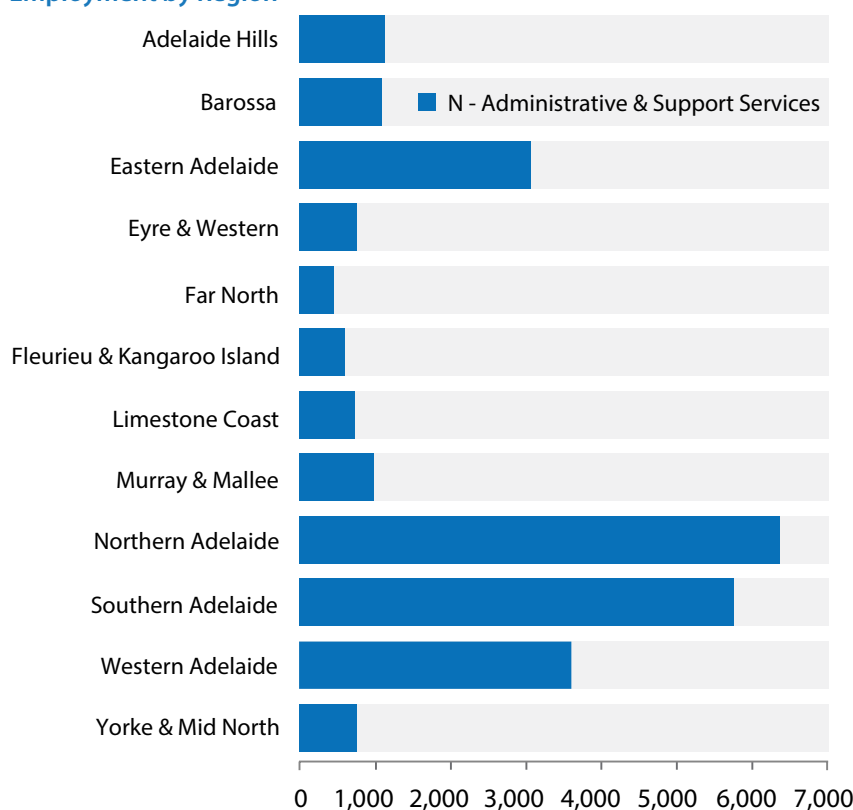
States, drive much of the training. However, regulatory requirements are often considered disincentives to potential new operators, making franchised operations more attractive to new entrants.

⁹ - <http://lmiip.gov.au/default.aspx?LMIP/IndustryInformation/DataTools>

Research has identified that over 70 percent of Australians travelling overseas booked their travel through a conventional travel agent, and about a third used alternatives such as direct bookings with airlines and hotels. In the year to June 2014, 4.7 million Australians had taken an overseas holiday in the last 12 months. Just under half had booked through a conventional travel agent, and 16 percent went through an online-only travel agent.¹⁰

As a service industry, any automation improvements have largely occurred, making skills less likely to be replaced by new technologies.

Figure 15 - Administrative & Support Services, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

¹⁰ - Roy Morgan Research, August 2014, Article No. 5760, <http://www.roymorgan.com/~media/Files/Findingspercent20PDF/2014/August/5760-2-overseas-travel-bookingmethods-australia-june-2014.pdf>

Skills needs

Survey respondents ranked the Sales and Customer Service skills cluster as having the highest importance, followed by the Administration and Support and then the Marketing and Engagement skills clusters.

Sustainability and Environmental and Language, Literacy and Numeracy (LLN) skills clusters were ranked of lowest importance by the Administrative and Support Services Survey respondents.

Table 5 - Administrative & Support Services, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Sales & Customer Service	1	2	↑
Administration & Support	2	5	↑
Marketing & Engagement	3	7	↑
Information & Technology	4	3	↓
Financial	5	6	↑
Managerial & Leadership	6	1	↓
Work Health & Safety (WHS)	7	4	↓
Human Resources	8	8	↔
Entrepreneurial	9	11	↑
Language, Literacy & Numeracy (LLN)	10	10	↔
Sustainability & Environmental	11	9	↓

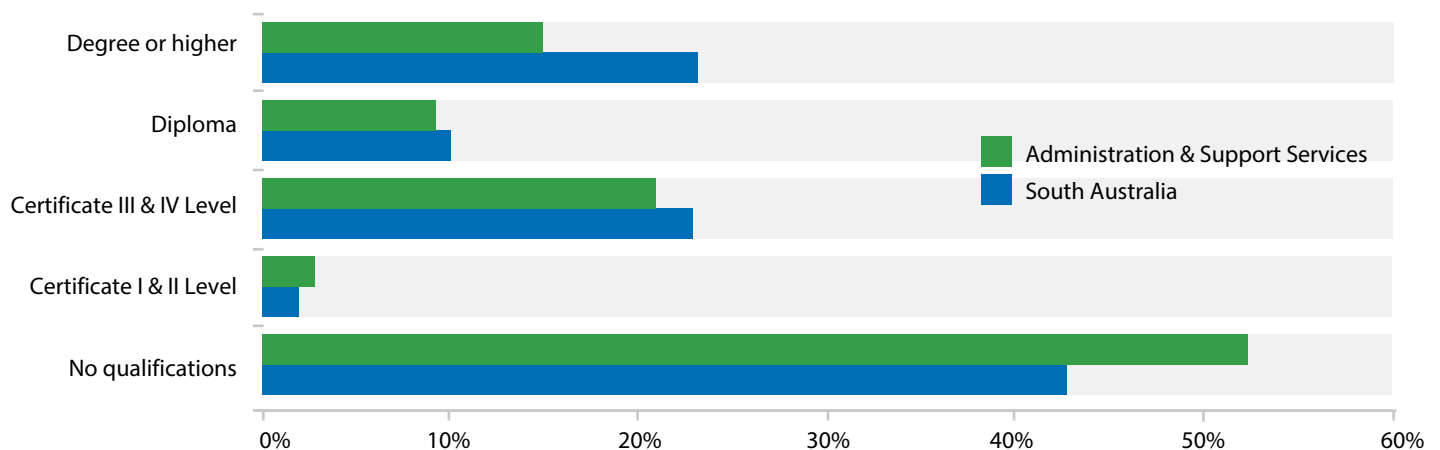


Workforce development themes and issues

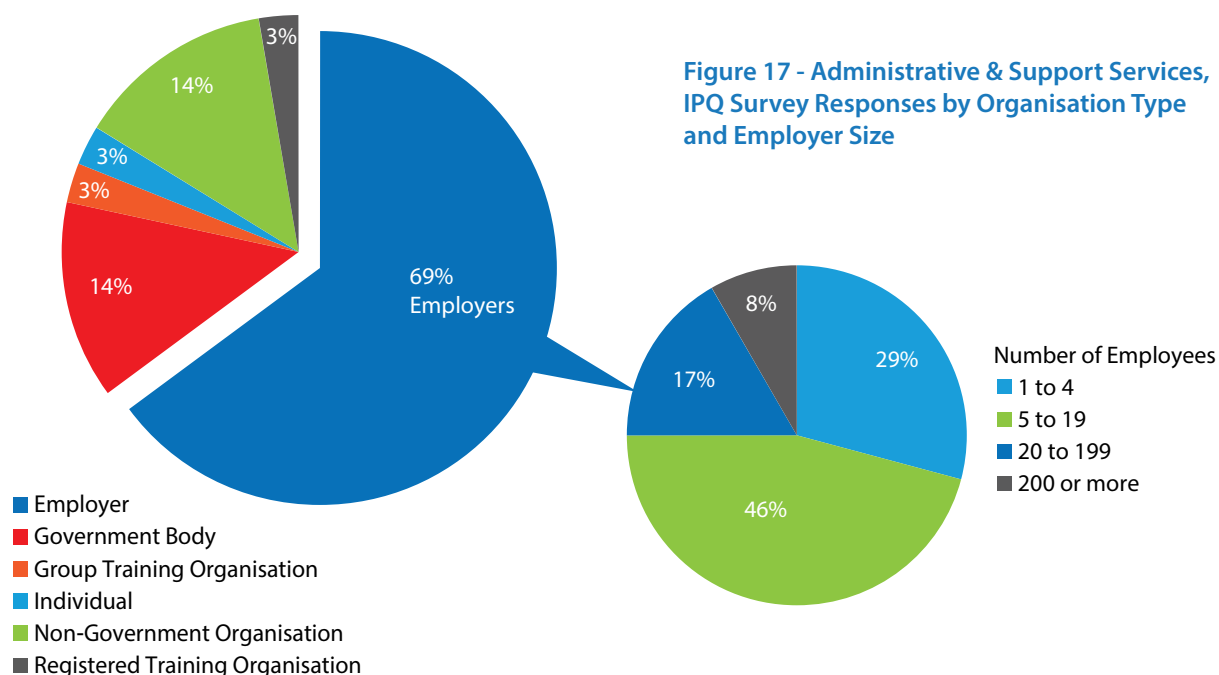
The low skill requirements for this industry result in challenges around recruitment and retention overshadowing skills shortages. Low levels of publicly funded training and a lack of demand for full qualifications results in a focus on mandatory training, which is largely directed to workplace health and safety and licensing. Low levels of Language, Literacy and Numeracy make training in this Industry a challenge but need to be addressed to ensure worker safety and adaption to new materials, tools and techniques.

With much of the work undertaken by small business owners, there is a need for small business skills across the Industry. Convenience, flexibility and relevance will be important drivers for this target group. Skill Sets may provide a short intensive approach and a pathway to complete qualifications.

Figure 16 - Administrative & Support Services, Employment Share by Post-School Qualification



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011



Industry Priority Qualifications

The Administration and Support Services industry received a total of 35 responses to the Survey. This exceeded the target number of responses, with the distribution among subsectors and organisation types broadly satisfactory.

The majority of employers in this industry sector were small to medium enterprises, and just over half projected some employee growth in the short-term.

Stakeholders made very few changes to the raw Survey results.

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset www.tasc.sa.gov.au

Table 6 - Administrative & Support Services, Prioritised Qualifications

Administration & Support Services

Tier 1 (Highest Priority)

Certificate IV in Business Sales
Certificate IV in Work Health and Safety
Certificate III in Business Administration

Tier 2 (High Priority)

Advanced Diploma of Management (Human Resources)
Diploma of Business Administration
Diploma of Human Resources Management
Certificate III in Business
Certificate III in Business Administration (Education)
Certificate III in Work Health and Safety
Certificate II in Emergency Medical Service First Response

Tier 3 (Priority)

Advanced Diploma of Business
Advanced Diploma of Leadership and Management
Advanced Diploma of Work Health and Safety
Diploma of Business
Diploma of Leadership and Management
Diploma of Website Development
Diploma of Work Health and Safety
Certificate IV in Accounting
Certificate IV in Business Administration
Certificate IV in Human Resources
Certificate IV in Leadership and Management
Certificate IV in Marketing
Certificate III in Information, Digital Media and Technology
Certificate II in Business



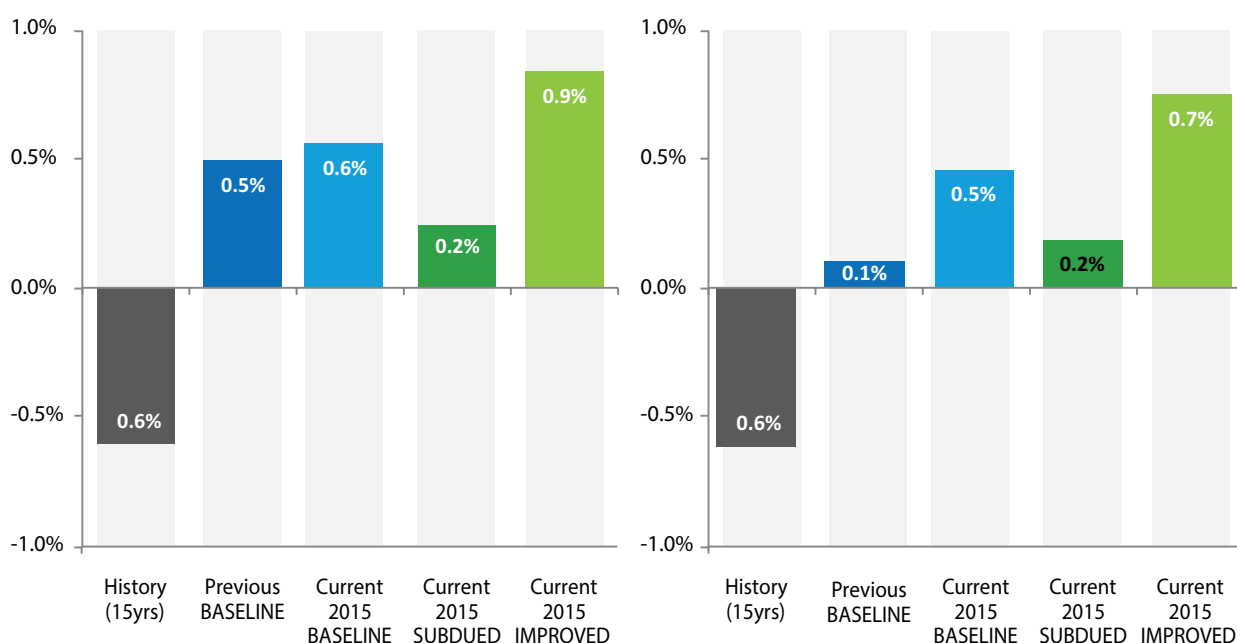
7.3 Agriculture, Forestry & Fishing

Employment Outlook

According to the Commission's interim modelling, employment in the Agriculture, Forestry and Fishing industry is projected to increase 0.6 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of -0.6 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth below the State average. As a result, its share of the State's employment is projected to decline from 5.4 percent to 5.1 percent.

**Figure 18 - Agriculture, Forestry & Fishing, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

Agricultural exports are one of the Australian Government's five pillars for a diversified, world class economy. Greater investment, both domestic and International, is flowing into Agriculture supply chains as policy settings, growing demand and a shifting global economy converge.

At the macro level, Agriculture is impacted by:

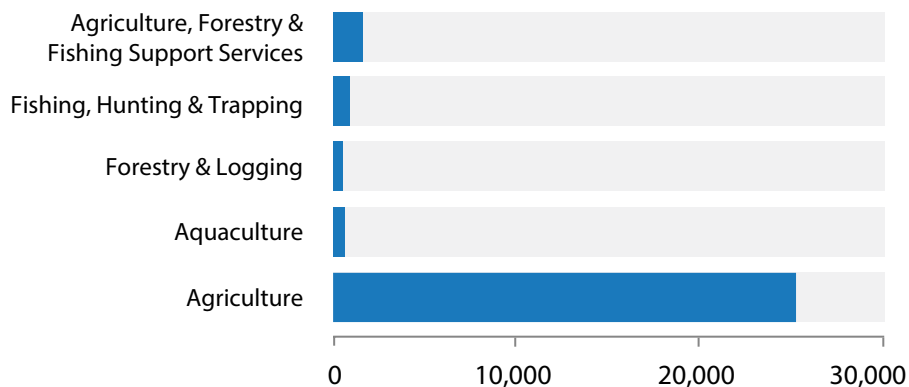
- global demography, which indicates that the Asia Pacific will account for 66 percent of the world's middle class by 2030. This is expected to manifest in increases in demand for meat, dairy, fruit, vegetables and pulses and an ageing workforce which may drive alternative job design
- environmental impacts on all aspects of agrifood with increased warming impacting on where crops, livestock and aquatic species will survive
- the global and national economy, with Australia now regarded as the most expensive country to manufacture - meaning there is a need for greater investment in technology, new plant and skills development to improve our competitiveness

- a digitally connected world which benefits business with Big Data, Internet use; and
- disruptive technologies leading to productivity increases.¹¹

The Agriculture sector is changing and is impacted by a range of factors including:

- Fewer and bigger farms
- Small and Medium Enterprises (SMEs), which comprise 98 percent of the 22,000 food and beverage businesses in Australia lack the agility, scale and management expertise to operate competitively
- Diversification into eco-tourism and agri-tourism - leading to increased income streams and reduced risk
- Fresh food retail concentration in Woolworths and Coles supermarkets
- Heightened animal welfare awareness and the associated implications for producers and processors; and
- Biosecurity concerns that currently provide Australia with a competitive advantage.¹²

Figure 19 - Agriculture, Forestry & Fishing, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

11 - http://cymcdn.com/sites/www.agrifoodskills.net.au/resource/resmgr/Publications/ESCAN_2015.pdf
12 - *ibid*

The South Australian Gross Food and Wine Revenue (GF&WR) continued to grow in 2013-14 by \$834 million (or 5 percent) to reach a record \$17.1 billion. The majority of this growth was generated through processed and commodity overseas exports and interstate processed sales. Jobs increased by 7,700 (up 5 percent) to 151,300 for the year ending in May 2014. This is significantly larger than the average annual increase of 1 percent experienced during the previous 12 years.

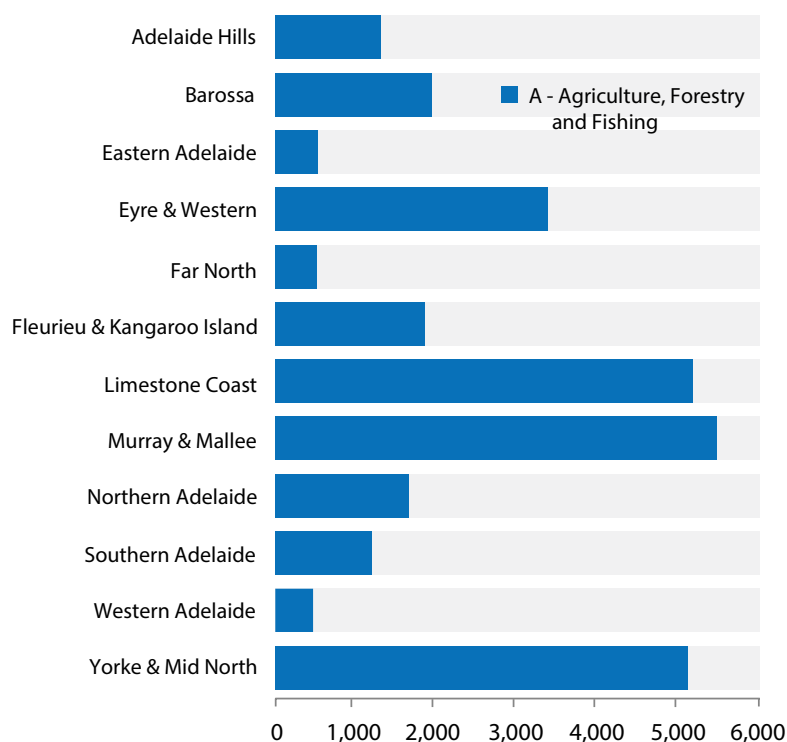
In 2013-14, primary production saw the largest increase of 12,800 jobs or 29 percent, compared to a decline in this category in 2012-13. Employment gains were recorded in food service, which increased by 3,000 or 7 percent. The South Australian food industry and their value-chains represent almost one in five or 18 percent of the State's employed workforce, with this share having remained reasonably steady over the last decade¹³.

The South Australian Government has a number of strategies to grow the Agrifoods Industry including the:

- SA Food Strategy 2010-2015
- SA Seafood Industry Food Plan 2010-2015; and
- South Australian River Murray Sustainability Programs (SARMS).

The forest and wood processing sector makes a significant contribution to the Australian and global economy, particularly in rural and regional Australia, through growing and manufacturing renewable and carbon-rich timber materials, bioenergy and other value-adding activities. South Australia's forest and wood processing industries are entirely plantation-based. Importantly, there is no harvesting of native forests in South Australia and they are protected by the Native Vegetation Act (1991). More than 13,000 people are directly or indirectly employed in the sector¹⁴.

Figure 20 - Agriculture, Forestry & Fishing, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

¹³ - http://www.pir.sa.gov.au/_data/assets/pdf_file/0007/236941/A2191728_Food_and_Wine_ScoreCard_2013-14.pdf

¹⁴ - http://pir.sa.gov.au/_data/assets/pdf_file/0012/234030/ForestryDL.pdf

Skills needs

Survey respondents ranked the Work Health and Safety (WHS) skills cluster as having the highest importance, followed by the Managerial and Leadership and then the Information and Technology skills clusters. This is consistent with the risk associated with this industry and the business skills required to run a successful and sustainable business.

Sales and Customer Service and Language, Literacy and Numeracy (LLN) skills clusters were ranked of lowest importance by the Agriculture, Forestry and Fishing Survey respondents. The low LLN ranking was somewhat surprising given the lower education levels held by much of this workforce.

Table 7 - Agriculture, Forestry & Fishing, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Work Health & Safety (WHS)	1	4	↑
Managerial & Leadership	2	1	↓
Information & Technology	3	3	↔
Sustainability & Environmental	4	9	↑
Financial	5	6	↑
Human Resources	6	8	↑
Administration & Support	7	5	↓
Entrepreneurial	8	11	↑
Marketing & Engagement	9	7	↓
Language, Literacy & Numeracy (LLN)	10	10	↔
Sales & Customer Service	11	2	↓

Workforce development themes and issues

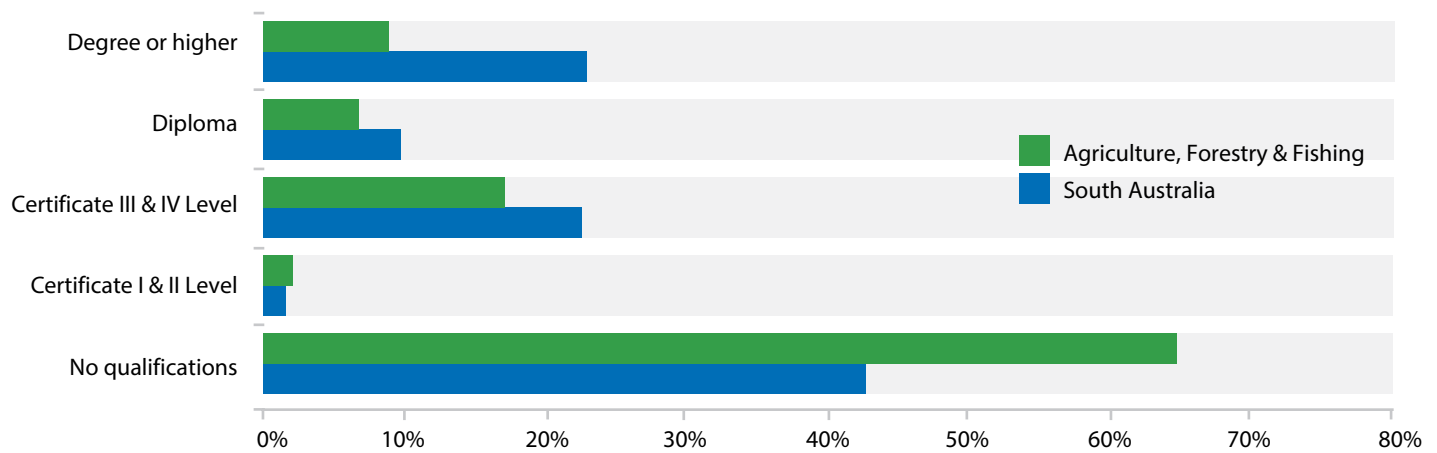
Australia's domestic labour supply does not meet all of the Agriculture, Forestry and Fishing Industry needs due to labour mobility inertia, the regional and remote location of most sectors, the seasonal and temporary nature of work, and in some instances, the harsh working conditions. Over time, automation and technology will replace many of the repetitive and low skilled operator jobs but in the near term the need for foreign labour is expected to continue, particularly in small to medium sized businesses and in sectors such as horticulture.

The Agriculture Industry workforce priorities are:

- building world-class business skills and risk management capability
- attracting smart, motivated and adaptive workers
- building higher level knowledge and skills within the existing workforce
- increasing enterprise's capability to innovate, adopt new technologies and apply research outcomes; and
- retaining the best and brightest workers.

The Agriculture Industry is calling for funding of Skill Sets and individual Units of Competency to meet the incremental learning needs of enterprises and learners; more transparency around the performance of Registered Training Organisations; and restoration of incentives for Certificate II Traineeships in key entry-level occupations.

Figure 21 - Agriculture, Forestry & Fishing, Employment Share by Post-School Qualification Level



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Training in the Forestry sector show the following characteristics, which exacerbate an already thin training market:

- economic uncertainty has led to a focus on informal in-house approaches to skill development that don't require payments to external training providers
- reduced enrolments in Government subsidised training for Apprenticeships and Traineeships; and
- Industry showing preference for fee for service short courses.

In the short to medium-term workforce development strategies supporting business development for the Forestry sector will need to focus on upskilling in several key competency areas:

- advanced process-oriented technical skills and digital literacy in high technology workplaces
- licence compliance and inventory skills across most workplaces
- skills for timber products supply chain, logistics solutions and analytics skills; and
- innovation skills including; leadership, communication, critical thinking and strategic thinking

Industry Priority Qualifications

The Agriculture, Forestry and Fishing Industry received a total of 67 responses to the Survey. This was more than double our target responses for this industry, based on employment share. Survey responses indicated a good distribution by sub-sector. Respondents in this industry primarily identified as employers.

Around half of the employers in this industry were micro-businesses. Stakeholders thought this might be underrepresented in terms of the number of micro-businesses in the industry. Stakeholders also commented that the ABS official employment figures might be too low, given the high number of contract and casual workers in the industry. Over half of the employers expected flat or declining employment growth in the short-term.

Stakeholders had some difficulty prioritising qualifications in this Industry, particularly due to the diverse nature of its sub-sectors. Significant discussions around the Priority Qualifications for the industry resulted in a number of changes to the Tiers.

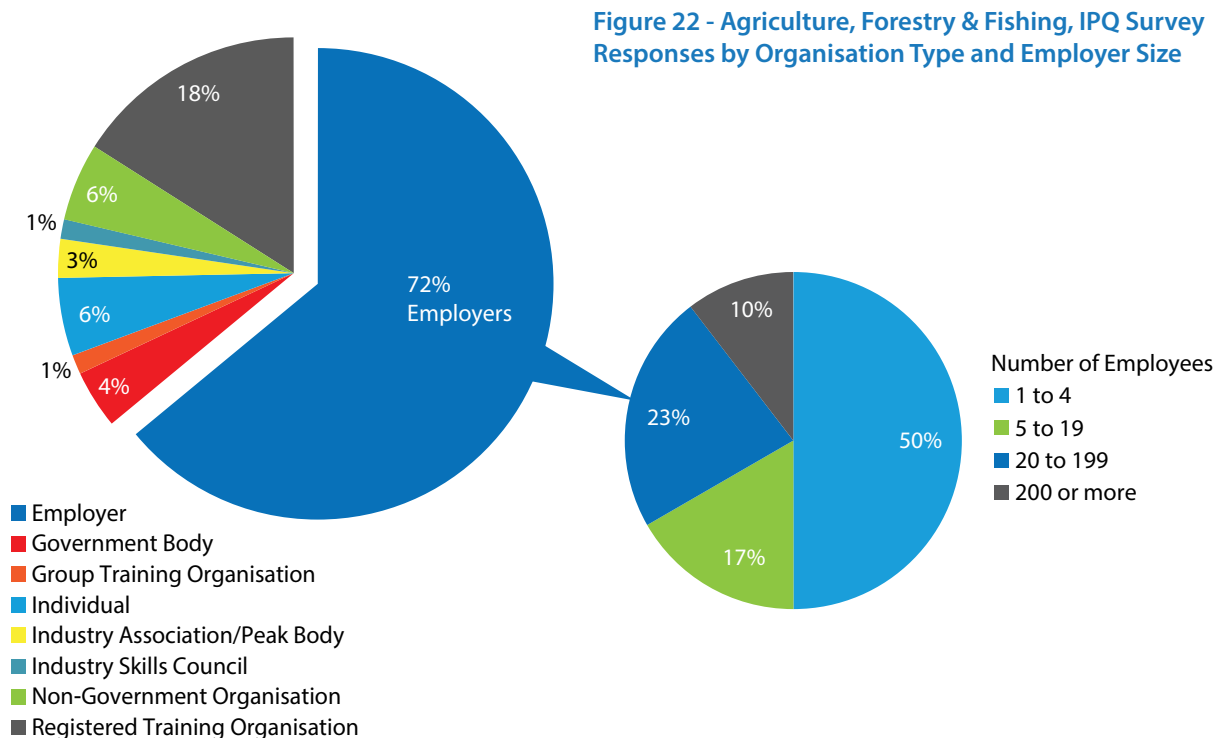


Table 8 - Agriculture, Forestry & Fishing, Prioritised Qualifications

Agriculture, Forestry & Fishing

Tier 1 (Highest Priority)	Tier 3 (Priority)
<p>Certificate IV in Wool Classing Certificate III in Aquaculture Certificate III in Harvesting and Haulage Certificate III in Horticulture Certificate III in Irrigation Certificate III in Papermaking Operations Certificate III in Production Horticulture Certificate III in Sawmilling and Processing Certificate III in Timber Truss and Frame Design & Manufacture Certificate II in Agriculture Certificate II in Maritime Operations (Coxswain Grade 1 Near Coastal) Certificate II in Maritime Operations (Marine Engine Driver Grade 3 Near Coastal) Certificate II in Rural Operations Certificate II in Shearing Skill Set (MAR) - Safety Training Certification Skill Set Skill Set (MAR) - Shipboard Safety Skill Set</p>	<p>Advanced Diploma of Business Advanced Diploma of Leadership & Management Advanced Diploma of Work Health and Safety Diploma of Business Diploma of Leadership and Management Diploma of Website Development Diploma of Work Health and Safety Certificate IV in Accounting Certificate IV in Business Administration Certificate IV in Human Resources Certificate IV in Leadership and Management Certificate IV in Marketing Certificate III in Information, Digital Media & Technology Certificate II in Business</p>
Tier 2 (High Priority)	
<p>Diploma of Agribusiness Management Diploma of Agriculture Diploma of Arboriculture Diploma of Horticulture Diploma of Production Horticulture Certificate IV in Agriculture Certificate IV in Leadership and Management Certificate IV in Papermaking Operations Certificate III in Agriculture Certificate III in Driving Operations Certificate III in Maritime Operations (Marine Engine Driver Grade 2 Near Coastal) Certificate III in Maritime Operations (Master up to 24 metres Near Coastal) Certificate III in Rural Operations Certificate III in Sawdoctoring Certificate III in Shearing Certificate III in Wool Clip Preparation Certificate II in Aquaculture Certificate II in Arboriculture Certificate II in Fishing Operations Certificate II in Horticulture Certificate II in Production Horticulture Certificate II in Wool Handling Certificate I in AgriFood Operations Skill Set (FPI) - Skill Set for a forestry log truck driver Skill Set (FPI) - Skill Set for a forwarder operator Skill Set (FPI) - Skill Set for a loader operator</p>	

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset

www.tasc.sa.gov.au





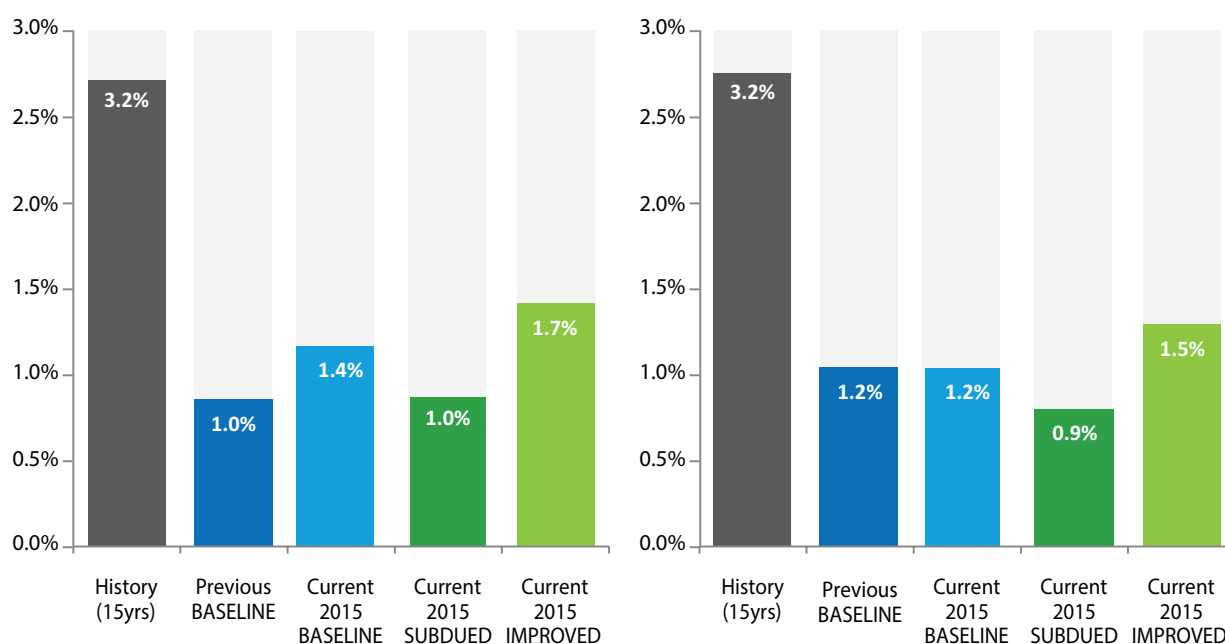
7.4 Arts and Recreation Services

Employment Outlook

According to the Commission's interim modelling, employment in the Arts and Recreation Services industry is projected to increase 1.4 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 3.2 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth around the state average. As a result, its share of the State's employment is projected to remain around 1.8 percent.

**Figure 23 - Arts & Recreation Services, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

The Arts and Recreation Services Industry includes:

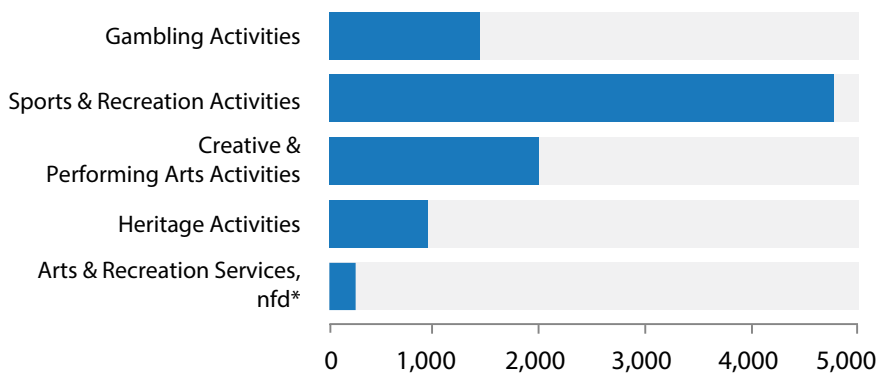
- live performances, events or exhibits (e.g. artists, musicians, writers, performers and venue operators)
- sporting or recreational activities (e.g. sports venues, gyms, sports clubs, amusement parks, horse and dog racing)
- the preservation and exhibition of historical, cultural or educational objects (e.g. museums, zoos, nature reserves, botanical gardens and parks); and
- gambling activities (e.g. casino, online gambling and lottery operators).

It is a complex industry with services delivered by not-for-profit organisations, Government bodies and large and small commercial enterprises.

Participation in the arts continues to grow, with South Australia's festival program earning the State an invitation to join an International network of cities which host the biggest festivals across the world. The majority of practitioners work as freelancers and consultants and use a small or microbusiness model.

The connection between innovation and creativity is growing and when aligned with the opportunities that digital technologies bring, can lead to the creation of new products that are generated, distributed and marketed in new ways. This is creating new business models such as customer centric co-creation and crowdfunding.

Figure 24- Arts & Recreation Services, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

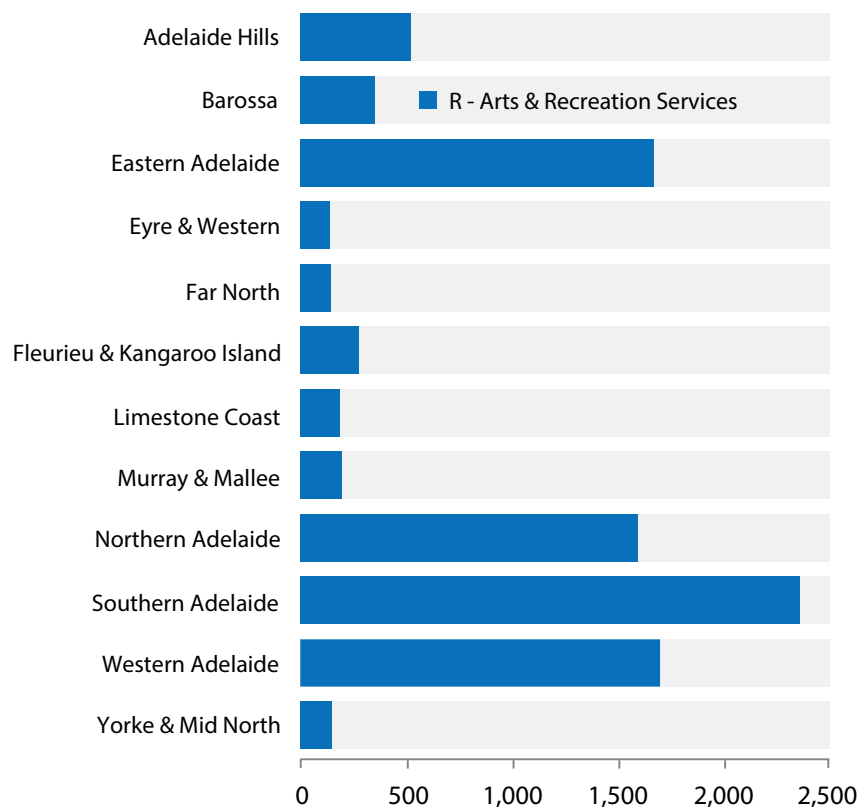
Libraries and museums are experiencing some renewed interest as they embrace digital technology to improve accessibility.

Sport is embedded in Australian culture at the local and professional levels. The cost of infrastructure is driving new participation and investment in multi-use sporting precincts.

The fitness sector is responding to changing consumer expectations, including access to 24-hour gyms and better use of outdoor group sessions in public spaces. Client profiles are changing as people are living longer and seeking fitness programs for older adults and those with medical conditions.

Community recreation and aquatic centres play an important role for those that can't afford a gym or personal fitness trainer. Local Governments in remote and regional areas have for some time recognised the benefits of community recreation activities as part of maintaining healthy regional communities. Outdoor education in schools is driving growth with schools outsourcing outdoor education programs to specialists due to high risks and high costs.

Figure 25 - Arts & Recreation Services, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Skills needs

Survey respondents ranked the Entrepreneurial skills cluster as having the highest importance, followed by the Managerial and Leadership and then the Marketing and Engagement skills clusters. This is consistent with the need for the workforce to not just create but also to promote their business. The Arts and Recreation Services industry was the only industry to rank the Entrepreneurial skills cluster as the highest priority, and is in contrast to the other Survey respondents ranking of this cluster as the lowest priority overall.

Human Resources and Language, Literacy and Numeracy (LLN) skills clusters were ranked of lowest importance by the Arts and Recreation Services Survey respondents.

Table 9 - Arts & Recreation Services, Ranked Skills Clusters

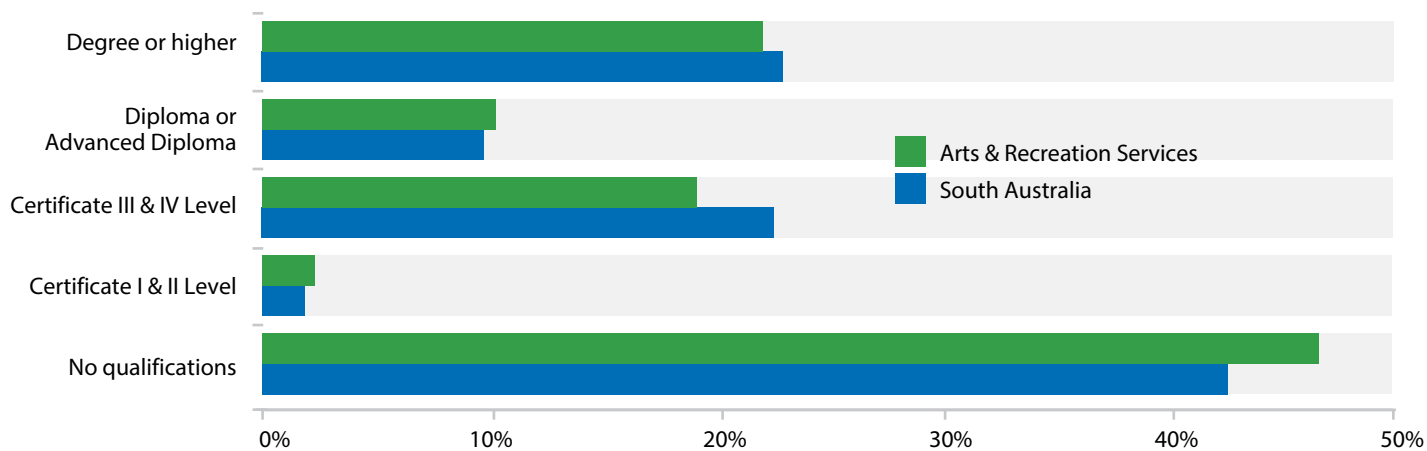
Skills Clusters	This Industry	All Respondents	Compare
Entrepreneurial	1	11	↑
Managerial & Leadership	2	1	↓
Marketing & Engagement	3	7	↑
Information & Technology	4	3	↓
Administration & Support	5	5	↔
Sales & Customer Service	6	2	↓
Financial	7	6	↓
Work Health & Safety (WHS)	8	4	↓
Sustainability & Environmental	9	9	↔
Human Resources	10	8	↓
Language, Literacy & Numeracy (LLN)	11	10	↓

Workforce development themes and issues

The Arts sector uses a wide cross-section of skills, which in some cases are highly specialised skills, but the seasonality of the work continues to make employment unreliable and career paths tenuous. Accompanying the artisan skills is a need for skills in education and public programming, enhanced writing and publishing skills and negotiation. Skill Sets may provide an avenue to develop new skills, a pathway to a qualification and accommodate the nature of the industry.

In addition to technical and artisan skills, the Arts sector is increasingly requiring business skills such as business planning, management and collaborative skills such as communication and project management. Creativity skills are being sought by other industries looking for new and creative solutions to create opportunities and address business objectives. Figure 34 Arts and Recreation Services, Employment Share by Post-School Qualification, 2011

Figure 26 - Arts & Recreation Services, Employment Share by Post-School Qualification Level



There is some unmet demand in the fitness industry for soft skills such as relationship management and the ability to work with medical and allied health professionals. Recent declines in enrolments are attributed to an oversupply of graduates. Some Skill Sets provide direct entry to several roles in demand such as swim teachers.

There are concerns that changes in funding for outdoor training in recreation may lead to a reduction in the number of graduates despite skill demand for outdoor leaders and outdoor education leaders. There is some discussion underway regarding the need for higher Australian Qualifications Framework (AQF) levels to provide the educational aspects required by schools and organisations working with marginalised young people¹⁵.

Volunteers play a big role in the workforce in the Arts and Recreation industry in all sectors. Time constraints put pressure on the availability of volunteers and the legislative requirements on volunteers can be burdensome. Their role in governance at the grassroots level is critical to professionalising the governance structures, and volunteers involved in governance should receive training in Mandatory Sports Governance Principles.

The proposed merging of some qualifications in Sport and Recreation will offer graduates more flexibility within and between these sectors, which may help create stability for the workforce and build career paths.

¹⁵ - <https://www.serviceskills.com.au/sites/default/files/files/Environmentalpercent20Scans/2015-SSA-Escan-SFR.pdf>

Industry Priority Qualifications

The Arts and Recreation Services Industry received a total of 48 responses to the Survey. This was one of several industries that received far more responses than the targeted number. The sub-sector distribution for the Industry indicates that the Creative and Performing Arts Activities sub-sector is overrepresented in the raw Survey data.

Almost two-thirds of respondents in this industry were micro or small employers. Just under half reported likely additions to staff in the short to medium-term.

A lack of representation from the Sports Industry led to the stakeholder consultation session being reconvened with a more representative group. A moderate number of qualifications were reprioritised through this process.

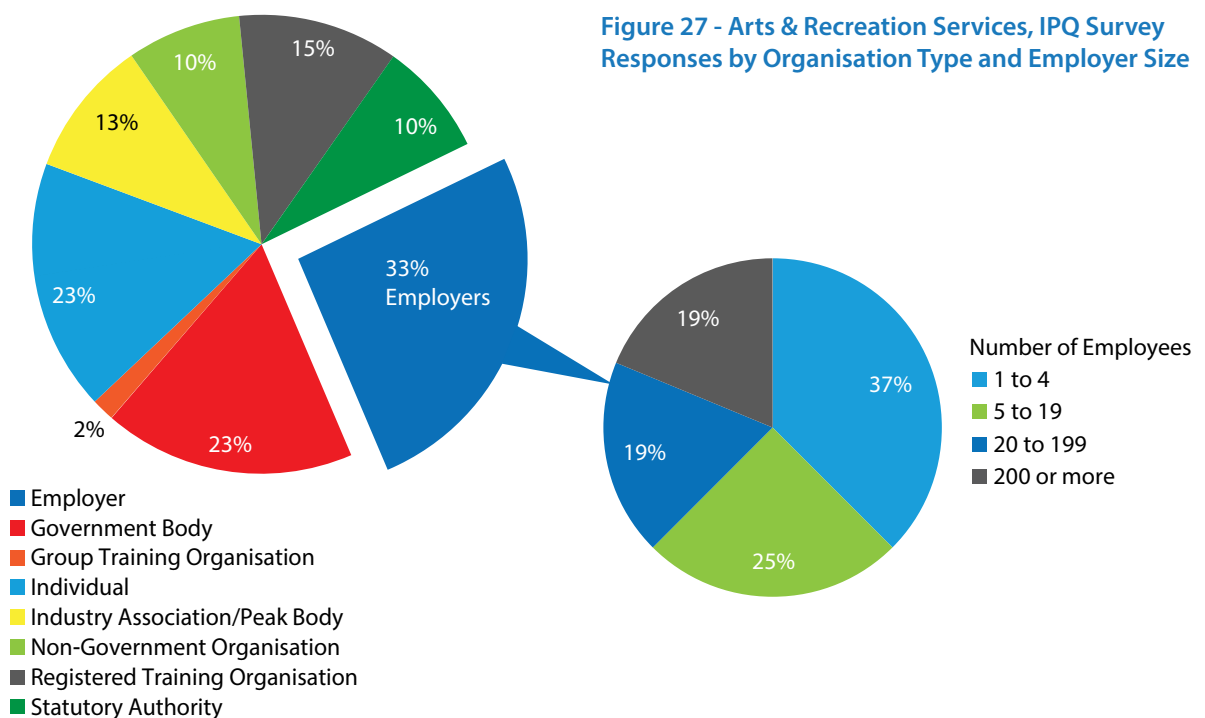


Table 10 - Arts & Recreation Services, Prioritised Qualifications

Arts and Recreation Services

Tier 1 (Highest Priority)	Tier 3 (Priority)
<p>Advanced Diploma of Creative Product Development</p> <p>Diploma of Events</p> <p>Certificate IV in Sport and Recreation</p> <p>Certificate IV in Visual Arts</p> <p>Certificate III in Aquatics</p> <p>Certificate III in Live Production and Services</p> <p>Certificate II in Aboriginal or Torres Strait Islander Cultural Arts</p>	<p>Advanced Diploma of Dance (Elite Performance)</p> <p>Advanced Diploma of Events</p> <p>Advanced Diploma of Leadership and Management</p> <p>Advanced Diploma of Program Management</p> <p>Advanced Diploma of Screen and Media</p> <p>Advanced Diploma of Visual Arts</p> <p>Diploma of Sound Production</p> <p>Diploma of Arts (Professional Writing)</p> <p>Diploma of Business Administration</p> <p>Diploma of Dance (Elite Performance)</p> <p>Diploma of International Business</p> <p>Diploma of Leadership and Management</p> <p>Diploma of Music</p> <p>Diploma of Outdoor Recreation</p> <p>Diploma of Project Management</p> <p>Diploma of Screen and Media</p> <p>Certificate IV in Arts Administration</p> <p>Certificate IV in Bookkeeping</p> <p>Certificate IV in Customer Engagement</p> <p>Certificate IV in Holiday Parks and Resorts</p> <p>Certificate IV in International Trade</p> <p>Certificate IV in Photo Imaging</p> <p>Certificate IV in Project Management Practice</p> <p>Certificate IV in Small Business Management</p> <p>Certificate IV in Sound Production</p> <p>Certificate III in Accounts Administration</p> <p>Certificate III in Business</p> <p>Certificate III in Dance</p> <p>Certificate III in Events</p> <p>Certificate III in Information and Cultural Services</p> <p>Certificate III in Micro Business Operations</p> <p>Certificate III in Outdoor Recreation</p> <p>Certificate III in Recordkeeping</p> <p>Certificate III in Technical Production</p> <p>Certificate III in Work Health and Safety</p> <p>Certificate II in Aboriginal and Torres Strait Islander Visual Arts Industry Work</p> <p>Certificate II in Aboriginal Language/s</p> <p>Certificate II in Live Production and Services</p> <p>Certificate I in Tourism (Australian Indigenous Culture)</p> <p>Skill Set (BSB) - Basic Customer Engagement Skill Set</p> <p>Skill Set (CUA) - Acting Performance Skill Set</p> <p>Skill Set (CUA) - Dance Teaching Skill Set</p> <p>Skill Set (CUA) - Festivals and Events Skill Set</p> <p>Skill Set (CUA) - Lighting Live Performance Skill Set</p> <p>Skill Set (CUA) - Props Making Skill Set</p> <p>Skill Set (CUA) - Set Construction Skill Set</p> <p>Skill Set (ICP) - Digital Fundamentals Skill Set</p> <p>Skill Set (SIS) - Climbing Instructor (Natural Surfaces) Top Rope</p> <p>Skill Set (SIS) - Cycle Tour Guide On-Road (Overnight and Extended Tours)</p> <p>Skill Set (SIS) - Kayaking Instructor Flat Water</p> <p>Skill Set (SIT) - Product Development for International Markets</p>
Tier 2 (High Priority)	
<p>Advanced Diploma of Live Production and Management Services</p> <p>Diploma of Graphic Design</p> <p>Diploma of Live Production and Technical Services</p> <p>Diploma of Marketing</p> <p>Diploma of Sport Development</p> <p>Diploma of Website Development</p> <p>Certificate IV in Leadership and Management</p> <p>Certificate IV in Live Production and Technical Services</p> <p>Certificate IV in Marketing</p> <p>Certificate IV in Outdoor Recreation</p> <p>Certificate III in Business Administration</p> <p>Certificate III in Fitness</p> <p>Certificate III in Information, Digital Media and Technology</p> <p>Certificate III in Sport and Recreation</p> <p>Certificate III in Visual Arts</p> <p>Certificate II in Information, Digital Media and Technology</p> <p>Certificate II in Visual Arts</p>	

A full list of **Tier 4 (Low Priority)** Industry Prioritised Qualifications are available in the IPQ Dataset

www.tasc.sa.gov.au





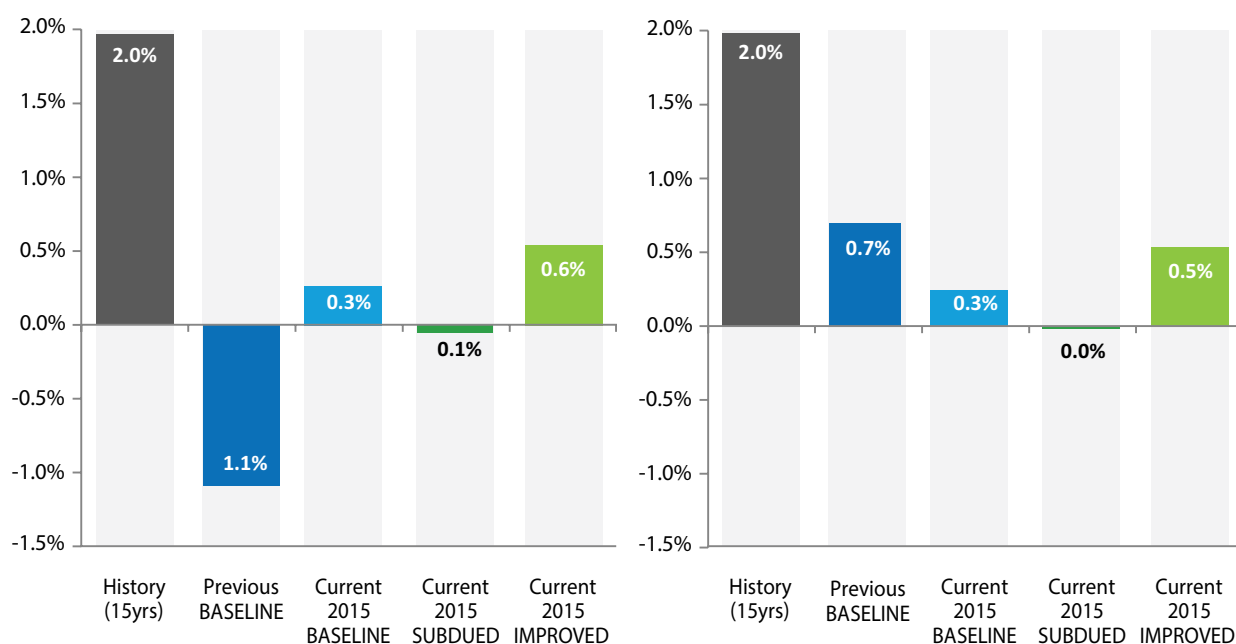
7.5 Construction

Employment Outlook

According to the Commission's interim modelling, employment in the Construction industry is projected to increase 0.3 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 2.0 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth below the State average. As a result, its share of the State's employment is projected to decline from 7.5 percent to 7.0 percent.

**Figure 28 - Construction, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

In June 2014, The Commonwealth Department of Employment identified Construction as the third largest employing Industry in Australia, employing 1,025,600 workers or 8.8 percent of total employment and this increased by 34,000 workers by November 2014. In South Australia, employment had declined in the five years up to November 2014 by 8.1 percent¹⁶.

Strong employment growth is expected nationally, particularly for services such as building structures, installation, heavy and civil engineering, land development and site preparation.

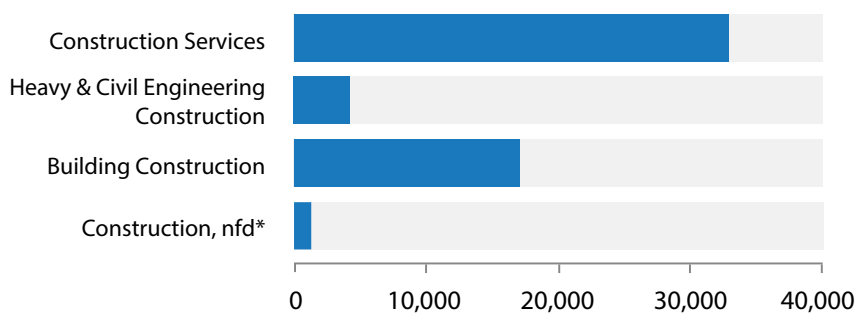
New housing approvals in March 2015 were up from the previous month, but were still 3.7 percent less when compared to the previous year and 11.3 percent behind five years ago¹⁷. In the June 2015 quarter, new dwelling commencements increased in South Australia by 12 percent¹⁸. While new private construction in South Australia is up from five years ago, alterations and additions are down. The irregular market is putting pressure on profit margins.

The South Australian Government's 2014-15 Major Development Directory details 326 projects worth \$94.7 billion underway or in the pipeline. This is positive news for an Industry concerned about commercial construction activity following the completion of the new Royal Adelaide Hospital (RAH).

The South Australian Construction Industry, which includes businesses in residential and non-residential construction, continues to face an unsteady future as it mirrors both the broader and local economies. Despite some promising housing indicators, the recent collapse of a number of building firms is concerning. The lower activity in the resources sector coupled with a higher than average unemployment rate and weak business and consumer confidence has seen 7,100 jobs shed over the past two years¹⁹.

South Australia's Coordinator General has the regulatory capacity to declare projects valued over \$3 million to be of economic significance, and to be assessed by the independent Development Assessment Commission (DAC) rather than local councils, allowing a smoother passage for planning approval. This change, along with State Government reductions in stamp duty on commercial property from 2018 is designed to stimulate the sluggish local Construction Industry.

Figure 29 - Construction, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

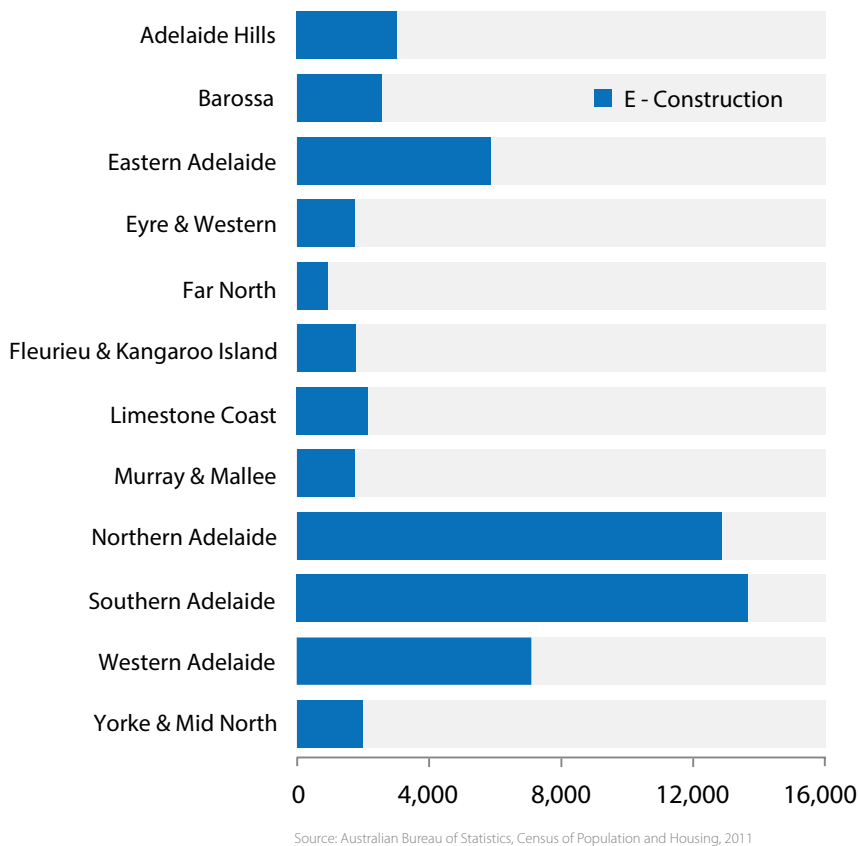
¹⁶ - Department of Employment, 20 15 Australian Jobs 2015, Australian Government

¹⁷ - http://issuu.com/crowtherblaynemediaspecialists/docs/2015_master_builders_sa_builder_mag_2505e1a6a78632?e=12823049/12034091

¹⁸ - *ibid*

¹⁹ - <https://sourceable.net/sa-Construction-sector-in-crisis-as-another-builder-collapses/>

Figure 30 - Construction, Employment by Region



Skills needs

Survey respondents ranked the Managerial and Leadership skills cluster as having the highest importance, followed by the Work Health and Safety (WHS) and then the Financial skills clusters. These are important skills in this industry and the recent abrupt closures of a number of South Australian Construction companies gives weight to the importance of management and leadership and financial skills.

Entrepreneurial and Marketing and Engagement skills clusters were ranked of lowest importance by the Construction Survey respondents.

Table 11 - Construction, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Managerial & Leadership	1	1	↔
Work Health & Safety (WHS)	2	4	↑
Financial	3	6	↑
Information & Technology	4	3	↓
Sustainability & Environmental	5	9	↑
Human Resources	6	8	↑
Administration & Support	7	5	↓
Language, Literacy & Numeracy (LLN)	8	10	↑
Sales & Customer Service	9	2	↓
Marketing & Engagement	10	7	↓
Entrepreneurial	11	11	↔

Workforce development themes and issues

The Construction Industry workforce has declined along with the contraction in Industry activity. Recent Apprenticeship data shows a fall in Apprentices in the Construction Industry since 2010, from 56,000 to 43,100 in 2014. Around 30,000 construction workers retire from the industry each year. Masters Builders SA believes that these trends could impact billions of dollars in investment, and place pressure on the industry to recruit skilled foreign workers²⁰.

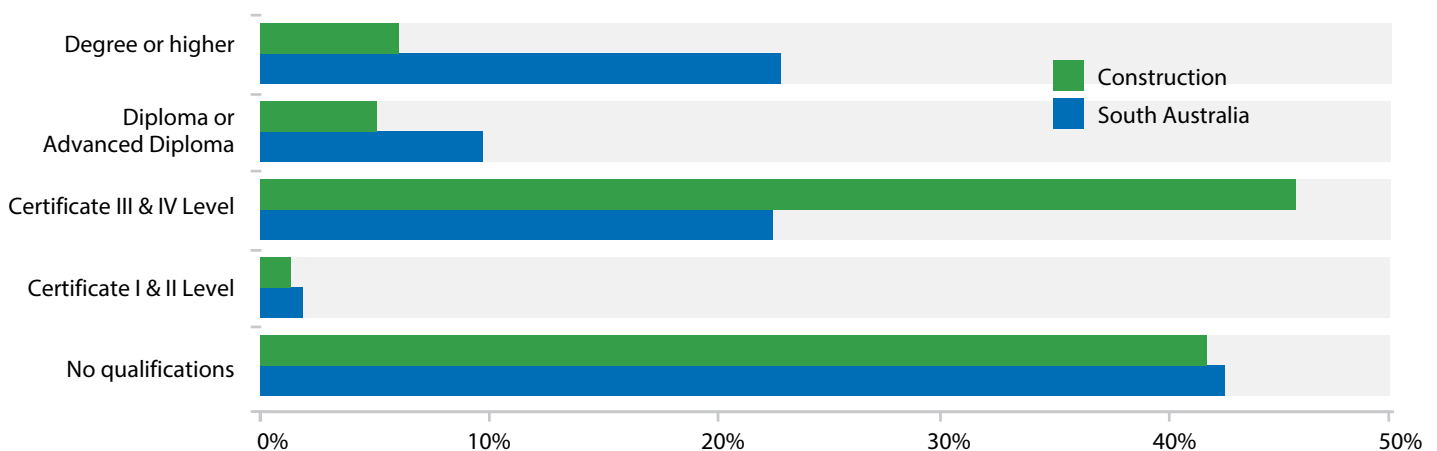
Attraction and retention of Apprentices is more difficult when the industry is experiencing subdued business sentiment and soft residential activity. Higher activity levels together with low Apprenticeship numbers may result in the re-emergence of skills shortages across construction trades.

Certificate III and Certificate IV remain the most popular qualifications, as they are closely linked to Apprenticeships and Traineeships and the building trades. At February 2014, 42.5 percent of the workforce was aged 34 years and under compared to all industries with 38.7 percent²¹.

As baby boomers retire from the Construction Industry, suitable skilled mentors and role models may be harder to find. Reduced Apprentice numbers, difficulties in recruitment and the retirement of baby boomers, may result in fewer tradespeople in the future when demand is expected to rise. This may encourage employers to adopt more flexible work practices and recruit those considered as marginalised in the labour market.

Recent trends into Smart ICT in the design and planning of infrastructure indicate that using tools like Building Information Modelling (BIM) and Project Team Integration (PTI) is expected to bring dividends by allowing greater sharing of information and closer collaboration. Uptake isn't widespread, particularly amongst small sub-contractors and sole traders who are generally slower to adopt new ways to work.

Figure 31 - Construction, Employment Share by Post-School Qualification Level



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

20 - http://issuu.com/crowtherblaynemediapecialists/docs/2015_master_builders_sa_builder_mag_2505e1a6a78632?e=12823049/12034091

21 - <http://www.cpsisc.com.au/resources/CPSISC/Industrypercent20Snapperpercent20Shot/Constructionpercent20Industrypercent20Snapshot.pdf>

Industry Priority Qualifications

The Construction Industry received a total of 42 responses to the Survey. This was slightly below the target number of responses for this Industry, although the distribution by organisational type was satisfactory. The sub-sector distribution showed underrepresentation from Construction Services.

This Industry was spread across employer sizes. Around half of employers reported likely additions to staff in the short to medium-term.

Stakeholders made a moderate number of changes to qualifications. In particular, qualifications identified as trades were given a higher priority.

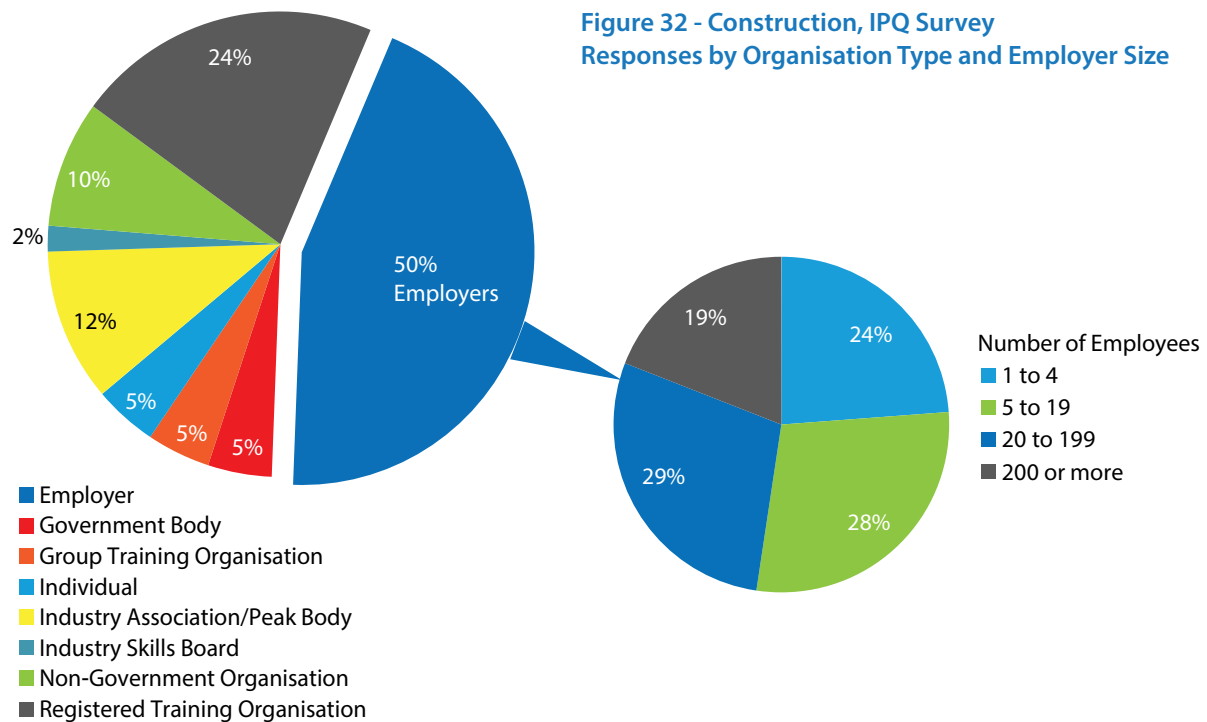


Table 12 - Construction, Prioritised Qualifications

Construction

Tier 1 (Highest Priority)

Certificate IV in Work Health and Safety
Certificate III in Bricklaying/Blocklaying
Certificate III in Carpentry
Certificate III in Plumbing
Certificate III in Roof Plumbing

Tier 2 (High Priority)

Diploma of Building and Construction (Building)
Diploma of Work Health and Safety
Certificate IV in Building and Construction (Building)
Certificate IV in Leadership and Management
Certificate IV in Plumbing and Services
Certificate IV in Project Management Practice
Certificate III in Concreting
Certificate III in Gas Fitting
Certificate III in Painting and Decorating
Certificate III in Wall and Ceiling Lining
Certificate II in Civil Construction
Certificate II in Construction
Certificate II in Construction Pathways
Certificate II in Metal Roofing and Cladding

Tier 3 (Priority)

Advanced Diploma of Building and Construction
(Management)
Diploma of Building and Construction (Management)
Diploma of Engineering Drafting (Accredited Course)
Diploma of Leadership and Management
Diploma of Project Management
Certificate IV in Small Business Management
Certificate IV in Business Administration
Certificate IV in Building and Construction
(Specialist Trades)
Certificate IV in Building and Construction
(Site Management)
Certificate IV in Building and Construction (Estimating)
Certificate IV in Building and Construction
(Contract Administration)
Certificate III in Carpentry and Joinery
Certificate III in Civil Construction
Certificate III in Civil Construction Plant Operations
Certificate III in Fire Protection
Certificate III in Joinery
Certificate III in Paving
Certificate III in Roof Tiling
Certificate III in Shopfitting
Certificate III in Solid Plastering
Certificate III in Steelfixing
Certificate III in Wall and Floor Tiling
Certificate III in Work Health and Safety
Certificate I in Construction

A full list of **Tier 4** (Low Priority) Industry Prioritised
Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au



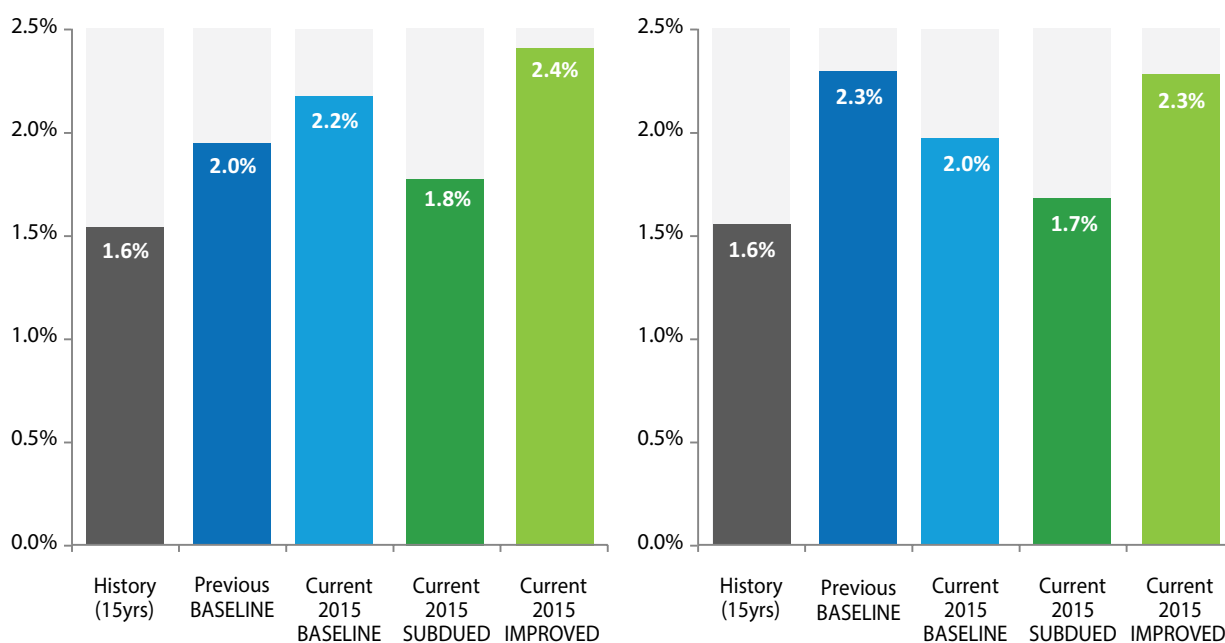
7.6 Education and Training

Employment Outlook

According to the Commission's interim modelling, employment in the Education and Training Industry is projected to increase 2.2 percent a year over the next five years under the baseline scenario. This compares with a rate of growth over the past 15 years of 1.6 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth above the State average. As a result, its share of the State's employment is projected to rise from 8.1 percent to 8.9 percent.

**Figure 33 - Education & Training, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

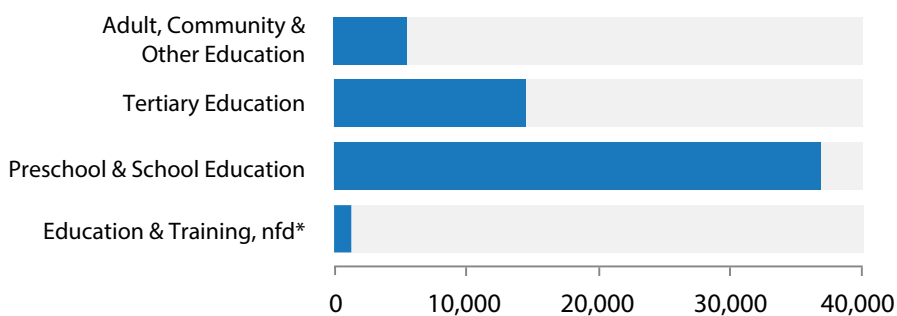
Skills for All was a one off investment by the State Government in vocational education and training (VET) that saw the commitment of 100,000 additional training places achieved well ahead of schedule. Skills for All was replaced in July 2015 with the WorkReady program, which aims to provide a new training and jobs strategy, a sustainable and stable system and training targeted at job opportunities. The program will be fully implemented by 1 July 2019 over three stages, with more new subsidised training places offered on a competitive basis between TAFE SA and private providers over that period.

A new Subsidised Training List (STL) targeted towards the State's economic priorities and jobs was developed and subsidies for 900 courses were reduced to 700.

The reduction in the number of courses on the new STL, with the majority of courses for 2015-16 being provided by TAFE SA have triggered concerns from private providers as well as sections of industry. Concerns have also been raised about student choice, which underpins a deregulated VET system and the impact on some private training providers in South Australia who have reported that they have had to lay off staff in a bid to stay solvent.

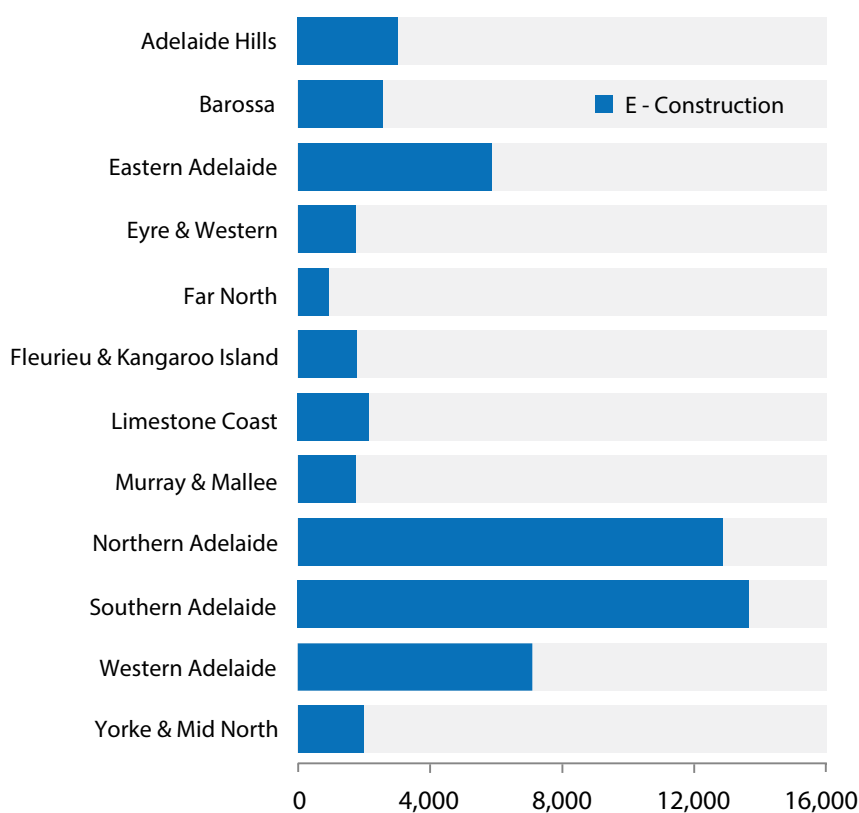
VET reforms have not been isolated to South Australia. National VET reforms have focussed on examining the quality standards for providers and the regulator, reducing the administrative burden on the VET sector arising from constant updates to Training Packages and ensuring that industry is involved in policy development and oversight.

Figure 34 - Education & Training, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Figure 35 - Education & Training, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Private providers in the VET sector have experienced some unwelcome media attention, including the naming and shaming of VET providers in Victoria accused of pressure sales tactics and profiteering at the public expense and that of the individuals who were considered vulnerable and at risk of exploitation. The Senate Education and Employment References Committee report has provided a review of unscrupulous marketing techniques, course fees, the VET FEE-HELP scheme and level of student debt.

A report on all activity delivered by Government providers and Government-funded activity delivered by community education and private training providers for the period January to June 2015 highlights a number of differences between students and courses in South Australia and nationally including:

- 35.9 percent of South Australian students were 24 years and under, compared to 42.6 percent nationally
- 6.6 percent of South Australian students were Apprentices and Trainees undertaking off-the-job training, compared to 19.1 percent nationally
- 30.9 percent of South Australian students were enrolled in a Certificate III compared to 37.2 percent nationally and 16 percent were enrolled in a Certificate II compared to 11.4 percent nationally
- enrolments by field of education showed minor differences between states with the exception of enrolments in management and commerce courses where 13.1 percent of South Australian students were enrolled compared to 17.2 percent nationally; and

- 57.8 percent of South Australian students studied at TAFE SA and other Government-based providers, compared to 63.4 percent nationally, while 38.4 percent of South Australian students studied with private training providers, compared to 31.5 percent nationally²².

The extent to which changes in State and National funding have impacted on this data is not clear at this stage.

A recent Survey by NCVER of employers highlights some significant changes in employer behaviour in South Australia between 2013 and 2015 including:

- 4.2 percent less employers used the VET system for training in the previous twelve months
- 2.3 percent more employers provided no training in the previous twelve months
- 6.2 percent less employers with Apprentices and Trainees used the VET system; and
- Employers were generally satisfied that training, both in the VET system and unaccredited met their skill needs²³.

This industry's perception in the training market is at risk of further erosion by a few unscrupulous operators at the expense of those who are providing excellent service. Those providers with effective relationships with their industries are expected to prosper. It is noted that South Australia does not suffer to the extent of other states with reputational issues.

22 - NCVER 2015, Australian vocational education and training statistics: government funded students and courses – January to June 2015, NCVER, Adelaide.

23 - NCVER 2015, Australian vocational education and training statistics: employers' use and views of the VET system 2015, NCVER, Adelaide.

Skills needs

Survey respondents ranked the Language, Literacy and Numeracy (LLN) skills cluster as having the highest importance, followed by the Managerial and Leadership and then the Information and Technology skills clusters. It is not clear whether LLN skills were those most important to the Education and Training workforce or their clients. Information and Technology skills are having a significant impact on how training is delivered and how business interacts with its clients.

Entrepreneurial and Work Health and Safety (WHS) skills clusters were ranked of lowest importance by respondents representing the Education and Training sector.

Table 13 - Education & Training, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Language, Literacy & Numeracy (LLN)	1	10	↑
Managerial & Leadership	2	1	↓
Information & Technology	3	3	↔
Financial	4	6	↑
Administration & Support	5	5	↔
Marketing & Engagement	6	7	↑
Sales & Customer Service	7	2	↓
Human Resources	8	8	↔
Sustainability & Environmental	9	9	↔
Work Health & Safety (WHS)	10	4	↓
Entrepreneurial	11	11	↔

Workforce development themes and issues

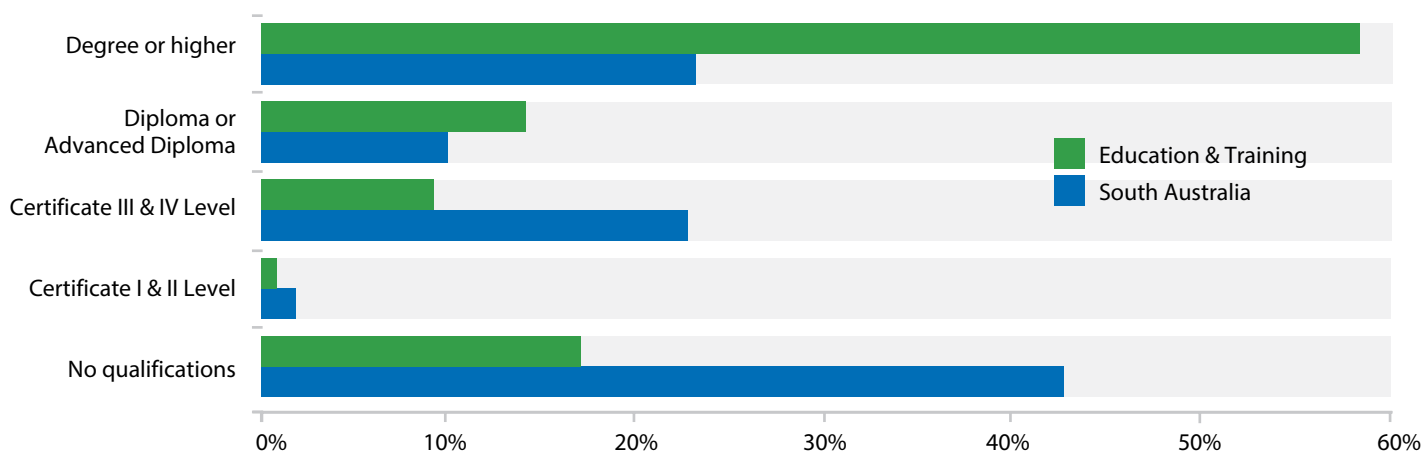
Previously training in South Australia was highly dependent on the Skills for All Funded Training List (FTL) and is now dependent on the new Work Ready Subsidised Training List (STL). The breadth of change makes long-term business and workforce planning challenging for Registered Training Organisations (RTOs), particularly those operating in niche areas. At the same time it encourages RTOs to invest in developing stronger business alliances with other providers and industry.

All Training Packages are expected to be streamlined and rationalised by the end of 2015. On the one hand, this is creating significant workloads for RTOs to ensure compliance with all of the standards as they transition to the new, and often 'not equivalent' qualifications.

On the other hand, the streamlining has led to a reduction in overall numbers of qualifications and increased flexibility within qualifications for both generic and specialised outcomes.

Business uncertainty for RTOs results in a highly casualised workforce that can be responsive and opportunistic. This can lead to operational shortcuts being taken and in some cases less than ideal learning outcomes and experiences for students.

Figure 36 - Education & Training, Employment Share by Post-School Qualification Level



New standards for skilled trainers and assessors which come into effect from 1 January 2016 are driving training activity for trainers and assessors.

Technology is providing RTOs with opportunities and risks. Bring Your Own Device (BYOD) supports flexibility for providers and learners but increases the need for providers to have reliable IT skills and support, from help desk to security and compliance.

Industry Priority Qualifications

The Education and Training industry received a total of 67 responses to the Survey. This was on par with the target number of responses for this sector. The distribution by sub-sector showed overrepresentation of the Adult Community Education (ACE) sector and underrepresentation of responses from Schools.

The majority of employers in this industry sector were medium to large enterprises. Around two-thirds of employers reported likely additions to staff in the short to medium term.

Stakeholders had lengthy discussions on how to balance the underrepresentation of the Preschool and School Education sub-sector, leading to the consultation being reconvened.

A moderate number of qualifications were reprioritised in this industry, particular from Tier 4 to Tier 3.

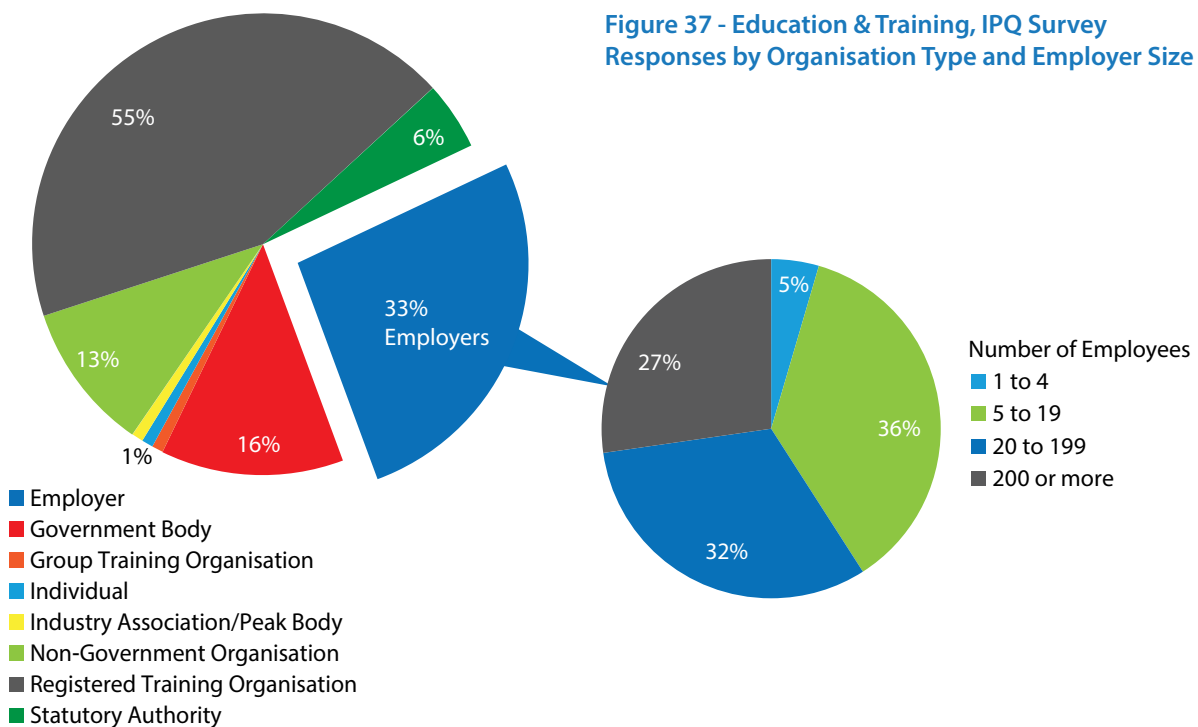


Table 14 - Education & Training, Prioritised Qualifications

Education and Training

Tier 1	Tier 3
Diploma of Early Childhood Education and Care Diploma of Vocational education and training Certificate IV in Language, Literacy & Numeracy Assessment & Training (Accredited Course) Certificate IV in Teaching English to Speakers of Other Languages (TESOL) (Accredited Course) Certificate IV in Training and Assessment Certificate III in Early Childhood Education and Care	Advanced Diploma of Accounting Advanced Diploma of Business Advanced Diploma of Community Sector Management Advanced Diploma of Graphic Design Advanced Diploma of Leadership and Management Advanced Diploma of Program Management Diploma of Accounting Diploma of Business Diploma of Child, Youth and Family Intervention Diploma of Education Support Diploma of Graphic Design Diploma of Website Development Diploma of Work Health and Safety Diploma of Youth Work Certificate IV in Accounting Certificate IV in Business Certificate IV in Business Administration Certificate IV in Community Services Work Certificate IV in English Proficiency Certificate IV in Human Resources Certificate IV in Marketing Certificate III in Business Certificate III in English Proficiency Certificate III in Recordkeeping Certificate III in Spoken and Written English Certificate III in Work Health and Safety Certificate II in Business Certificate II in Education and Skills Development Certificate II in Skills for Work and Vocational Pathways Certificate II in Spoken and Written English
Tier 2	
Diploma of Business Administration Diploma of Human Resources Management Diploma of Leadership and Management Diploma of Project Management Diploma of Training Design and Development Certificate IV in Child, Youth and Family Intervention Certificate IV in Leadership and Management Certificate IV in Project Management Practice Certificate IV in Work Health and Safety Certificate IV in Youth Work Certificate III in Information, Digital Media and Technology Certificate III in Business Administration Certificate III in Community Services Work Certificate III in Disability Certificate II in Information, Digital Media and Technology	

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au



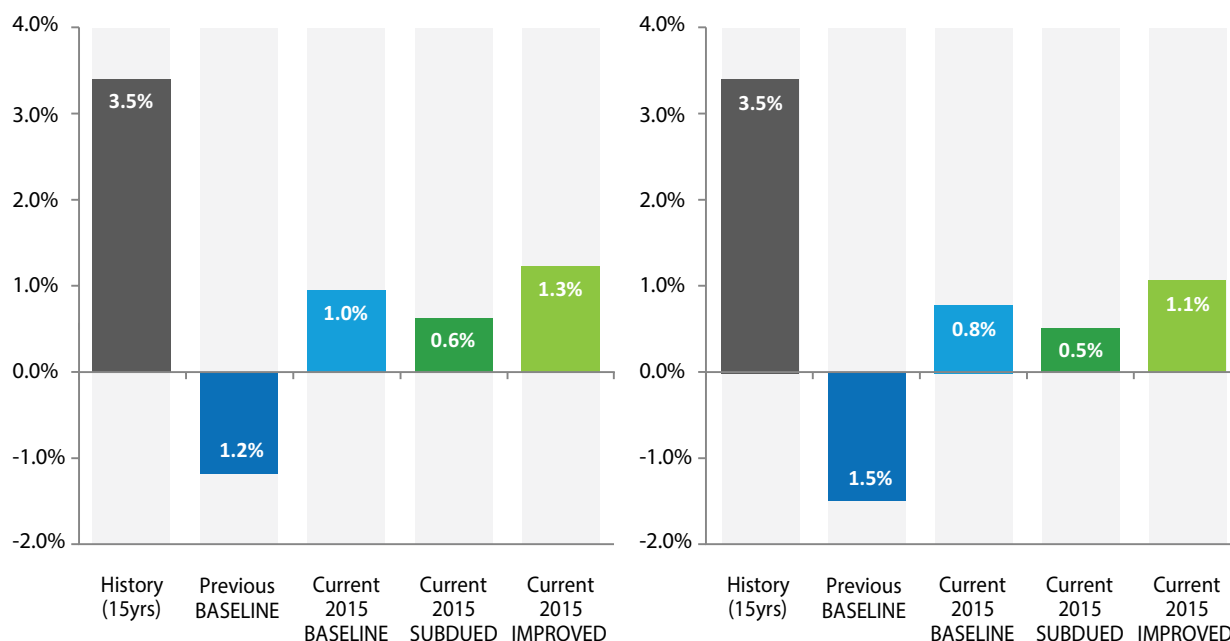
7.7 Electricity, Gas, Water and Waste Services

Employment Outlook

According to the Commission's interim modelling, employment in the Electricity, Gas, Water and Waste Services industry is projected to increase 1.0 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 3.5 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth around the State average. As a result, its share of the State's employment is projected to remain around 1.3 percent.

Figure 38 - Electricity, Gas, Water & Waste Services, Average Annual Employment Change 2014-15 to 2019-20 and 2014-15 to 2024-25

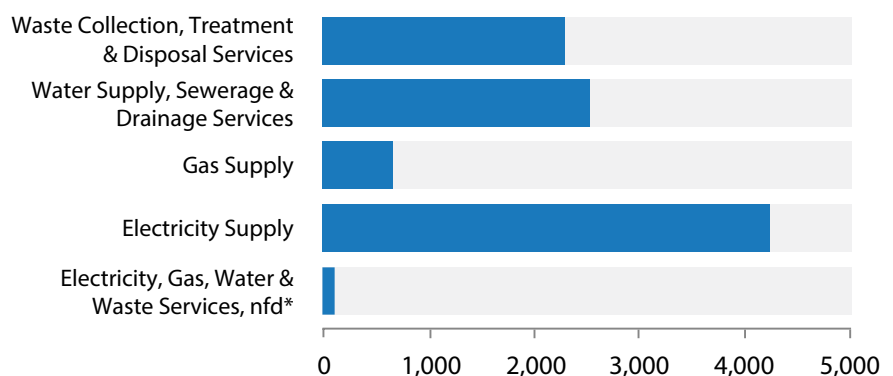


Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

Electricity demand on the National Electricity Market (running across Queensland, New South Wales, Tasmania, Victoria, South Australia and the ACT) has fallen for an unprecedented fifth straight year, and now sits at over 8 percent below its 2009 peak. Three factors appear to be driving the decline in aggregate electricity consumption, including; energy efficiency, consumer engagement (initiated by rising prices and measurement/management technology) and distributed generation (particularly rooftop photovoltaic panels and solar hot water heaters).

Figure 39 - Electricity, Gas, Water & Waste Services, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

South Australia has the highest penetration rate of solar panels in Australia, with a full quarter of homes having panels installed. This has had the effect of pushing peak demand in South Australia from 5pm to 7pm since 2008.

The Gas Supply Industry (GSI) transmits approximately 60 percent of natural gas for electricity generation and the rest through the distribution network to households and businesses.²⁴

Growth in the Waste Production sector continues to increase. South Australia supports more than 50 businesses that reprocess paper, metal, glass, plastics, concrete, asphalt, timber, electronic waste and garden organics. 82 percent of the State's recycled material is treated

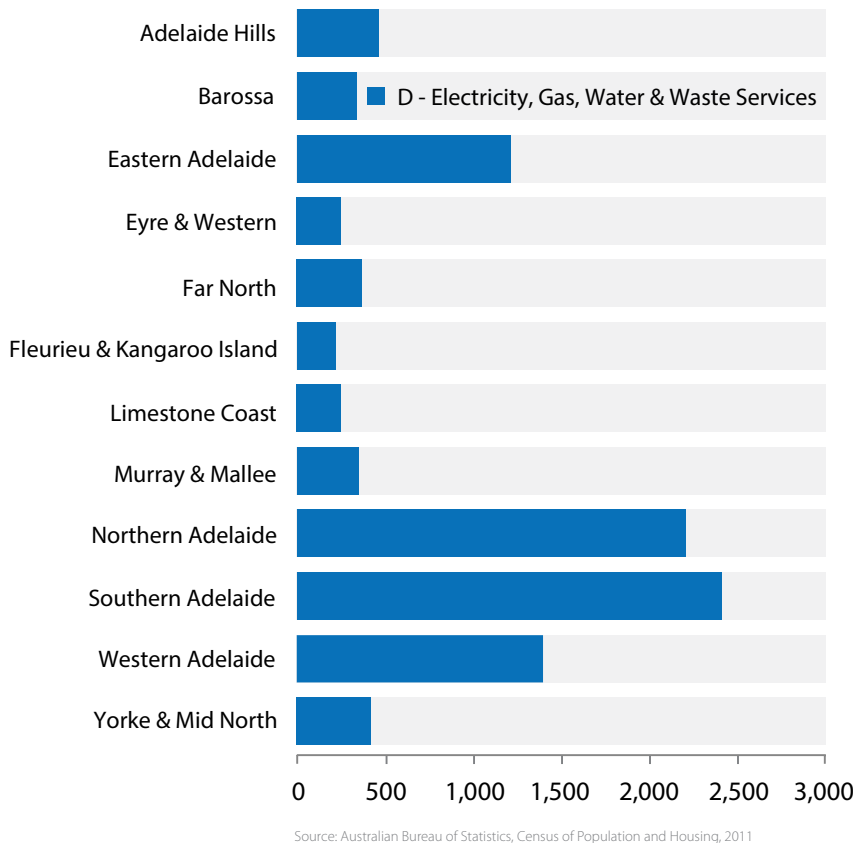
locally²⁵. Local Governments have been working on rationalizing waste collection to improve efficiencies.

Largely driven by necessity, South Australia has been a leader in water and waste treatment for some time. The Water industry Alliance is a cluster sponsored by the South Australian Government to build an Internationally competitive, export-orientated water industry made up of SMEs. Further developments have seen two new specialisation clusters: a managed aquifer recharge group (MARHub) and a wastewater group (WaRDA).

²⁴ - <https://www.sa.gov.au/topics/water-energy-and-environment/energy/energy-supply-and-sources/non-renewable-energy-sources/gas/sa-gas-industry>

²⁵ - http://www.zerowaste.sa.gov.au/upload/resource-centre/publications/reuse-recovery-and-recycling/ZWSA_Upclose_Industry_web.pdf

Figure 40 - Electricity, Gas, Water & Waste Services, Employment by Region



Skills needs

Survey respondents ranked the Work Health and Safety (WHS) skills cluster as having the highest importance, followed by the Sustainability and Environmental and then the Information and Technology skills clusters. This is consistent with the workplace risks associated with this industry and moves towards energy reduction and environmental sustainability now available through new technology.

Language, Literacy and Numeracy (LLN) and Entrepreneurial skills clusters were ranked of lowest importance by Electricity, Gas, Water and Waste Survey respondents. This was somewhat unexpected, as many enterprises in this industry are small and medium businesses that need entrepreneurial skills to build their market.

Table 15 - Electricity, Gas, Water & Waste Services, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Language, Literacy & Numeracy (LLN)	1	10	↑
Managerial & Leadership	2	1	↓
Information & Technology	3	3	↔
Financial	4	6	↑
Administration & Support	5	5	↔
Marketing & Engagement	6	7	↑
Sales & Customer Service	7	2	↓
Human Resources	8	8	↔
Sustainability & Environmental	9	9	↔
Work Health & Safety (WHS)	10	4	↓
Entrepreneurial	11	11	↔

Workforce development themes and issues

Providing households and businesses with the capacity to monitor and manage their consumption requires a fundamental shift in work practices. The embedding of energy efficiency and sustainability units into the core of all energy sector qualifications into existing standards (now completed) will ensure that new tradespeople, or those who undertake specialised training, will apply energy efficient work practices. Energy efficiency training for existing workers through upskilling in Skill Sets could provide cost benefits for new technologies associated with smart systems.

Liquid waste collection services are expected to grow strongly, with Environmental Protection Authority and other Government requirements being a major driver of activity. Solid waste collection services have increased and industry has been investing in labour saving devices to reduce employment numbers.

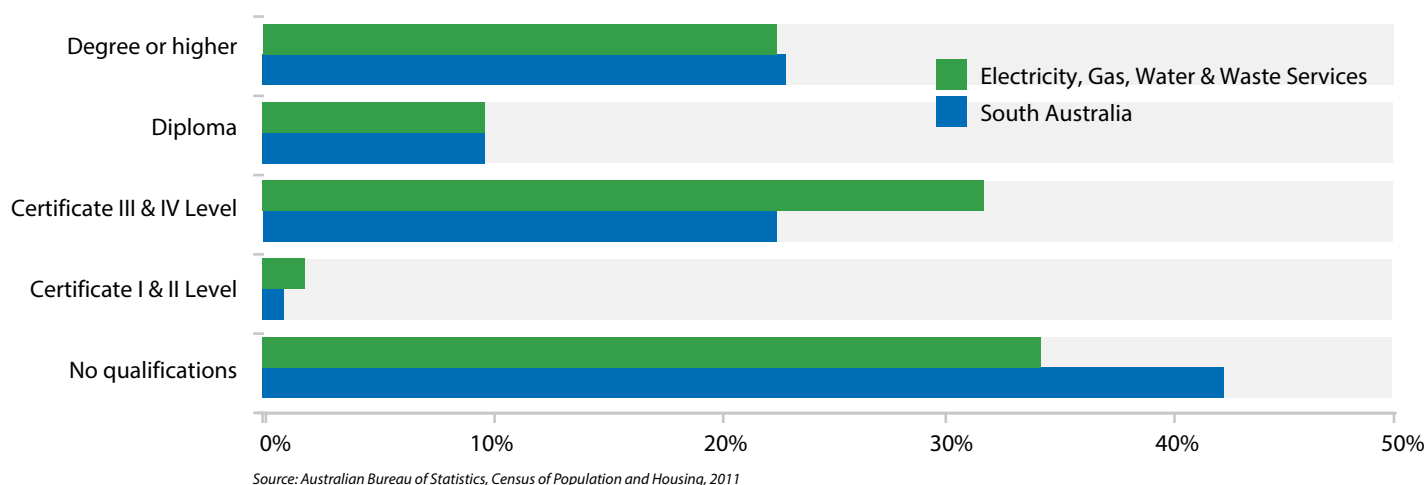
With increasing technological and legislative impacts, the waste sector is highly complex and requires a new generation of skilled personnel to lead, direct and work with important community and global issues, such as understanding environmental risk and contingency management, as well as meet the increasing demands for Work Health and Safety compliance and new technology skills²⁶.

Trades play a very important role in the Electricity, Gas, Water and Waste Services industry. Apprentice numbers are down, posing long-term issues for workforce planning and short-term skill shortages as a consequence of low recruitment numbers.

Training in Skill Sets offers experienced tradespeople the opportunity to upskill and reskill but needs to be targeted and flexible to meet workplace priorities.

26 - <http://www.cpsisc.com.au/resources/CPSISC/Industrypercent20Snapperpercent20Shot/Wastepercent20Managementpercent20Industrypercent20Snapshot.pdf>

Figure 41 - Electricity, Gas, Water & Waste Services, Employment Share by Post-School Qualification Level



Industry Priority Qualifications

The Electricity, Gas, Water and Waste industry received a total of 17 responses to the Survey. This was more than double the target responses for this Industry, based on employment share. Respondents in this industry primarily identified as employers.

Employers in this industry were predominantly medium sized businesses. Around two-thirds of employers expected flat or declining employment growth in the short-term.

A small number of qualifications were reprioritised by stakeholders in this industry. In particular, Qualifications relevant to SA Water were boosted, given they have a very large number of employees.

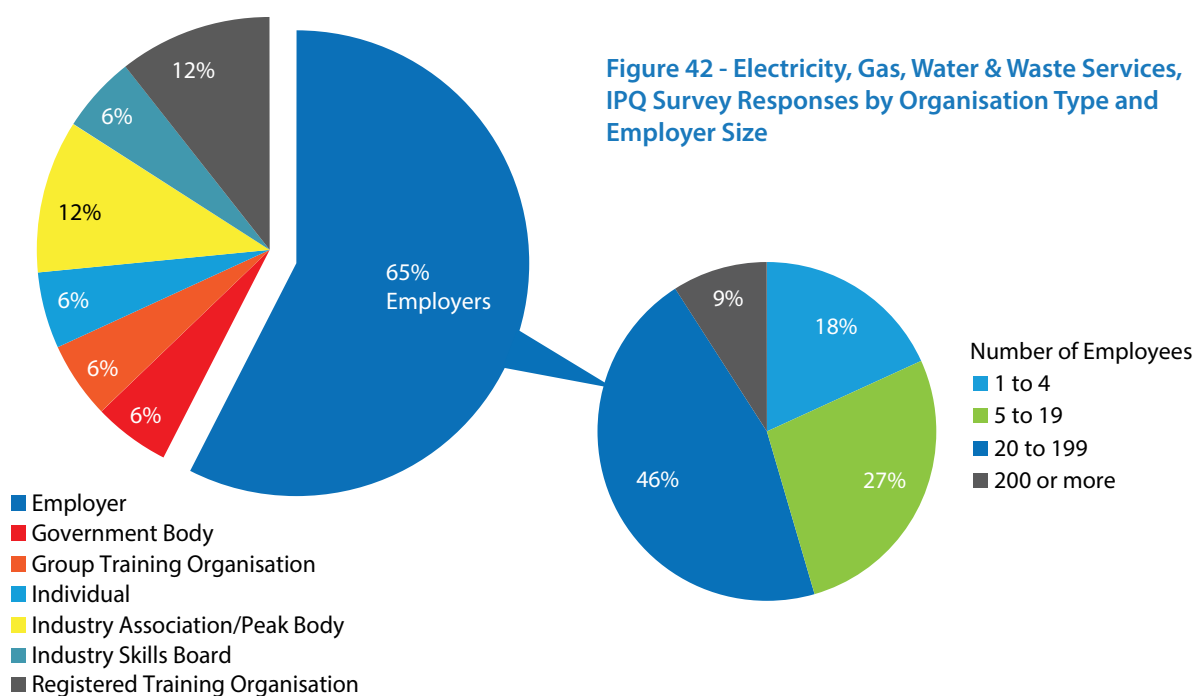


Table 16 - Electricity, Gas, Water & Waste Services, Prioritised Qualifications

Electricity, Gas, Water & Waste Services

Tier 1	Tier 3
Certificate IV in Work Health and Safety Certificate III in Air-conditioning and Refrigeration Certificate III in Electrotechnology Electrician Certificate III in ESI - Power Systems - Distribution Overhead Certificate III in Instrumentation and Control Certificate II in Electrotechnology (Career Start)	Diploma of Accounting Diploma of Air-conditioning and Refrigeration Engineering Diploma of Human Resources Management Diploma of Leadership and Management Diploma of Purchasing Certificate IV in Accounting Certificate IV in Air-conditioning and Refrigeration Servicing Certificate IV in Business Certificate IV in Electrical - Data and Voice Communications Certificate IV in Electrical - Renewable Energy Certificate IV in Human Resources Certificate IV in Leadership and Management Certificate IV in Plumbing and Services Certificate IV in Purchasing Certificate IV in Refrigeration and Air-conditioning Systems Certificate IV in Training and Assessment Certificate III in Accounts Administration Certificate III in Business Certificate III in Business Administration Certificate III in ESI - Power Systems - Transmission Overhead Certificate III in Fire Protection Certificate III in Information, Digital Media and Technology Certificate III in Waste Driving Operations Certificate III in Water Operations Certificate II in Emergency Medical Service First Response Certificate II in Water Operations Skill Set (UET) - Refresher - Perform CPR Skill Set (UET) - Refresher - Perform EWP Rescue and CPR Skill Set (UET) - Refresher - Perform Pole Top Rescue Skill Set (UET) - Refresher - Perform Rescue from a Live LV Panel and CPR
Tier 2	
Advanced Diploma of Electrical - Engineering Advanced Diploma of Engineering Technology - Electrical Advanced Diploma of Work Health and Safety Diploma of Electrical Engineering Diploma of Work Health and Safety Certificate IV in Electrical - Instrumentation Certificate IV in Electrotechnology - Systems Electrician Certificate IV in Renewable Energy Certificate III in Data and Voice Communications Certificate III in Driving Operations Certificate III in Gas Fitting Certificate III in Gas Supply Industry Operations Certificate III in Plumbing Certificate III in Roof Plumbing Certificate III in Work Health and Safety Certificate II in Sustainable Energy (Career Start)	

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au



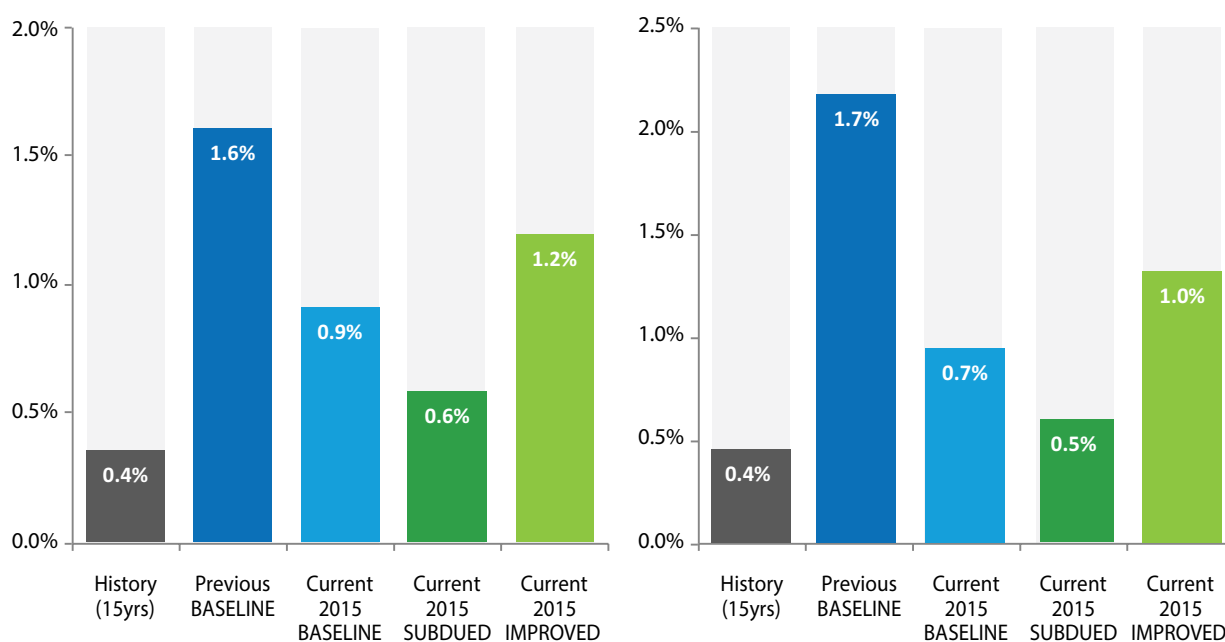
7.8 Financial and Insurance Services

Employment Outlook

According to the Commission's interim modelling, employment in the Financial and Insurance Services industry is projected to increase 1 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 0.4 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth below the State average. As a result, its share of the State's employment is projected to decline from 2.7 percent to 2.6 percent.

Figure 43 - Financial & Insurance Services, Average Annual Employment Change 2014-15 to 2019-20 and 2014-15 to 2024-25



Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

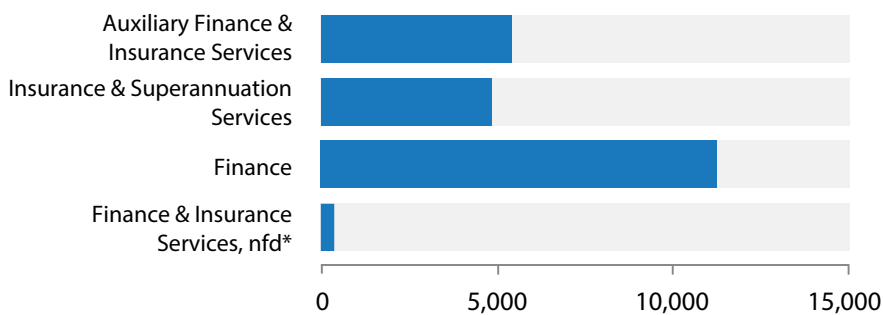
The Financial and Insurance Services Industry covers the full array of money management services including banks, building societies and credit unions, insurers, superannuation providers, fund managers, accountants and bookkeepers, financial planners and advisers, debt collectors, financial markets, personal trustees and credit agencies.

New South Wales followed by Victoria are the powerhouses for the Financial and Insurance Services Industry, with South Australia essentially a delivery node in a distributed network.

The Financial Services Industry is positioning itself to respond to a range of demographic, economic, regulatory, social and environmental trends, including:

- policy and regulation changes – a fluctuating regulatory environment as a result of changes in Government and new proposals arising from the financial system inquiry, and generally increasing regulatory requirements on the back of the global financial downturn along with recent investigations into the financial planning sector
- technology transformation – a range of technological developments including the increasing availability of large volumes of customer data, mounting rates of cybercrime, and growth in mobile services and payment systems
- changing customer needs and expectations – demographic and technology changes bringing demands for new products and services and increasing complexity of customer interactions; and
- social investment and climate change – increasing interest in social investment and integrating information on climate risks into various social products.

Figure 44 - Financial & Insurance Services, Employment by Sub-Sector



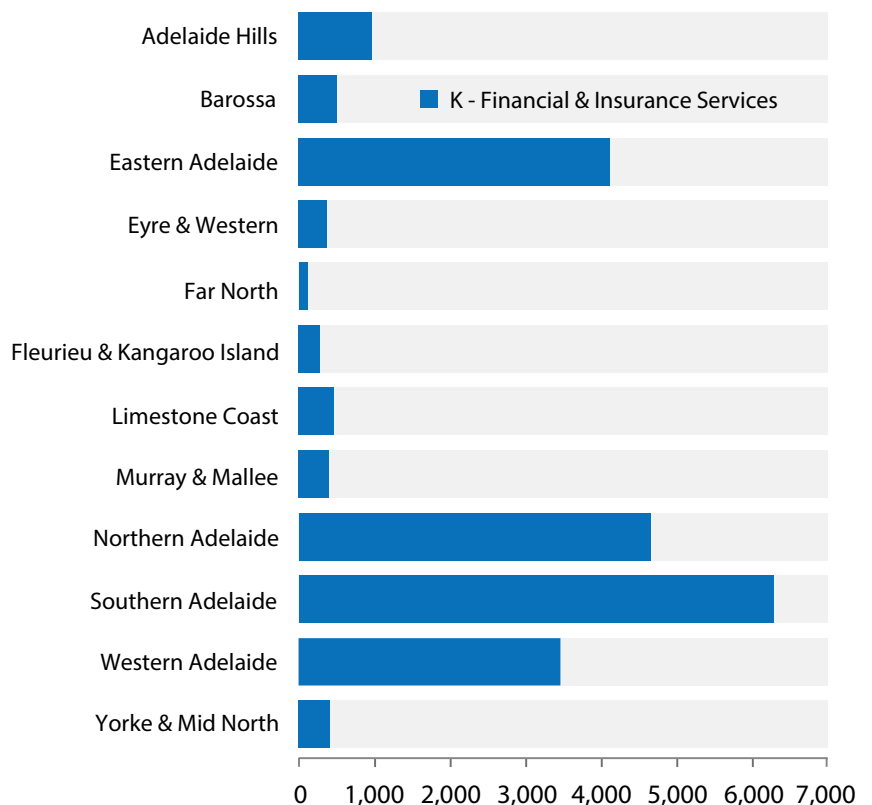
Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Figure 60 Financial & Insurance Services,
Employment by Sub-sector

Virtually all households and businesses consume financial services. Therefore, the location of businesses tends to correspond to population hubs. For services such as banking there is a slight bias towards the less populated States and Territories, such as South Australia where more branches per capita are required to service a more dispersed population. However, services such as insurance and fund managers do not have extensive branch networks and tend to have their major offices located in the financial hubs of Sydney and Melbourne.

Deloitte Access Economics estimates that 65 percent of Australia's industries are going to experience significant disruption from digital technology in the next five years, with the Financial Services Industry near the top of the list. The Financial Services Industry needs to be effectively integrating key digital processes, including Cloud technology, mobile payment systems, social networks, data and analytics and cybercrime²⁷ while, at the same time, preparing for the impact of a range of emerging technologies such as wearable devices and new currencies²⁸.

Figure 45 - Financial & Insurance Services,
Employment by Region



27 - Hillard, R. (2013) *Banking technology trends 2013*

28 - Jacobs (2014) *Five emerging technologies that will transform financial services*

Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Skills needs

Survey respondents ranked the financial skills cluster as having the highest importance, followed by the Administration and Support and then the Information and Technology skills clusters.

Sustainability and Environmental and Work Health and Safety (WHS) skills clusters were ranked of lowest importance by the Financial and Insurance Services Survey respondents, which is consistent with other 'white collar' industries, such as Information Media and Telecommunications.

Table 17 - Financial & Insurance Services, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Financial	1	6	↑
Administration & Support	2	5	↑
Information & Technology	3	3	↔
Sales & Customer Service	4	2	↓
Managerial & Leadership	5	1	↓
Marketing & Engagement	6	7	↑
Human Resources	7	8	↑
Entrepreneurial	8	11	↑
Language, Literacy & Numeracy (LLN)	9	10	↑
Work Health & Safety (WHS)	10	4	↓
Sustainability & Environmental	11	9	↓

Workforce development themes and issues

In the year to August 2015, there were 22,300 people employed in the industry, accounting for 2.8 percent of the South Australian workforce. This is down by 1,000 (or 4.3 percent) since 2010, when the total South Australian workforce increased by 6,700 for the same period. Nationally, the workforce is primarily employed full-time (83 percent) and has a slight majority of male employment at 51.7 percent. Contrastingly, in South Australia, 74.0 percent are employed full-time and females make up 51.1 percent of the work force²⁹.

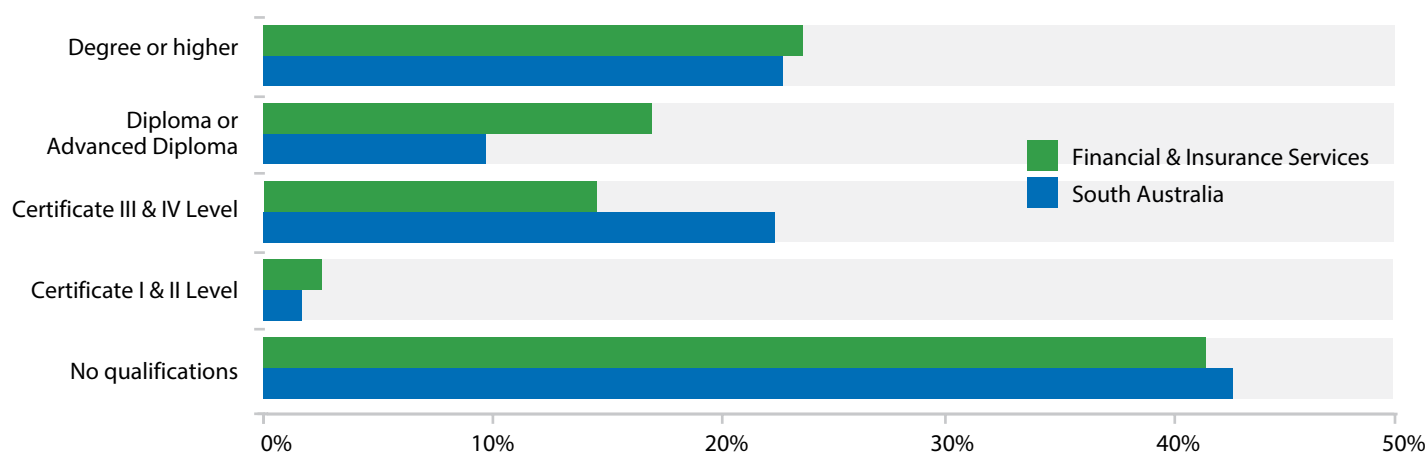
While there is strong employment growth forecast for the Industry, particularly in financial planning, superannuation funds management and custody, trustee and stock exchange sectors, South Australia is not expected to benefit significantly.

The workforce is highly educated with 47.8 percent with a Bachelor degree or higher, and Advanced Diplomas and Diplomas being the most commonly held vocational qualifications³⁰.

29 - <http://workforcewizard.skills.sa.gov.au/ReportResult.aspx>

30 - <http://lmp.gov.au/default.aspx?LMIP/IndustryInformation/DataTools>

Figure 46 - Financial & Insurance Services, Employment Share by Post-School Qualification Level



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Since 2009, enrolments in VET qualifications related to the Financial and Insurance Services Industry have decreased by 944 (or 27.0 percent) while for the South Australian workforce VET student numbers have increased by 7,992 (or 6.6 percent).³¹

Workforce development needs can be grouped into the following key skill areas:

- leadership and management skills, particularly for frontline employees who are defining the customer experience
- Analytics to capture and manipulate data, creativity and business acumen in addition to being able to share data and insights with others. Increasingly, even non-specialists in the industry need to have an understanding of the language of analytics (maths, statistics and IT); and
- knowledge of and working within regulatory compliance frameworks.

As workers seek increased work flexibility, employers will need to invest in workplace arrangements that support their autonomy.

³¹ - <http://workforcewizard.skills.sa.gov.au/ReportResult.aspx>

Industry Priority Qualifications

The Financial and Insurance Services Industry received a total of 39 responses to the Survey. The number of responses exceeded the target for this industry, with satisfactory sub-sector distribution. Respondents in this industry overwhelmingly identified as employers.

Over three-quarters of employers in this industry were small or medium businesses. Around half of the employers expected employment growth in the short-term.

Stakeholders made very few changes to the raw Survey results for this Industry.

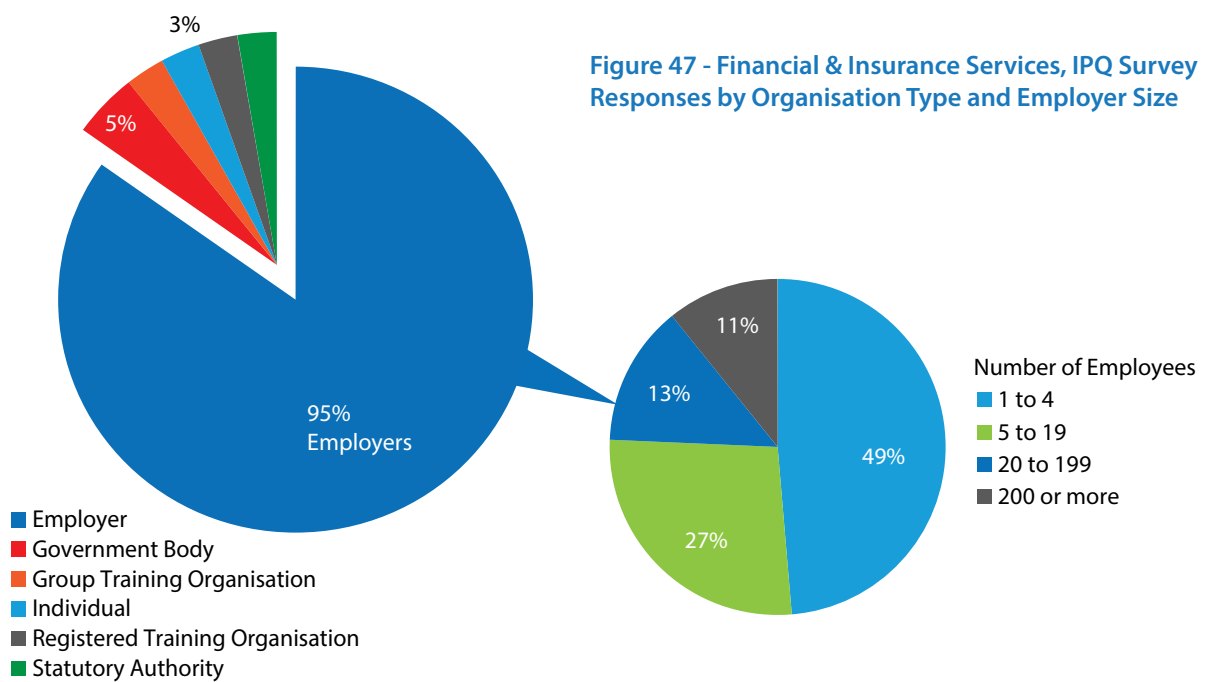


Table 18 - Financial & Insurance Services, Prioritised Qualifications

Financial and Insurance Services

Tier 1	Tier 3
<p>Certificate IV in Work Health and Safety Certificate III in Air-conditioning and Refrigeration Certificate III in Electrotechnology Electrician Certificate III in ESI - Power Systems - Distribution Overhead Certificate III in Instrumentation and Control Certificate II in Electrotechnology (Career Start)</p>	<p>Diploma of Accounting Diploma of Air-conditioning and Refrigeration Engineering Diploma of Human Resources Management Diploma of Leadership and Management Diploma of Purchasing Certificate IV in Accounting Certificate IV in Air-conditioning and Refrigeration Servicing Certificate IV in Business Certificate IV in Electrical - Data and Voice Communications Certificate IV in Electrical - Renewable Energy Certificate IV in Human Resources Certificate IV in Leadership and Management Certificate IV in Plumbing and Services Certificate IV in Purchasing Certificate IV in Refrigeration and Air-conditioning Systems Certificate IV in Training and Assessment Certificate III in Accounts Administration Certificate III in Business Certificate III in Business Administration Certificate III in ESI - Power Systems - Transmission Overhead Certificate III in Fire Protection Certificate III in Information, Digital Media and Technology Certificate III in Waste Driving Operations Certificate III in Water Operations Certificate II in Emergency Medical Service First Response Certificate II in Water Operations Skill Set (UET) - Refresher - Perform CPR Skill Set (UET) - Refresher - Perform EWP Rescue and CPR Skill Set (UET) - Refresher - Perform Pole Top Rescue Skill Set (UET) - Refresher - Perform Rescue from a Live LV Panel and CPR</p>
Tier 2	
<p>Advanced Diploma of Electrical - Engineering Advanced Diploma of Engineering Technology - Electrical Advanced Diploma of Work Health and Safety Diploma of Electrical Engineering Diploma of Work Health and Safety Certificate IV in Electrical - Instrumentation Certificate IV in Electrotechnology - Systems Electrician Certificate IV in Renewable Energy Certificate III in Data and Voice Communications Certificate III in Driving Operations Certificate III in Gas Fitting Certificate III in Gas Supply Industry Operations Certificate III in Plumbing Certificate III in Roof Plumbing Certificate III in Work Health and Safety Certificate II in Sustainable Energy (Career Start)</p>	

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset

www.tasc.sa.gov.au





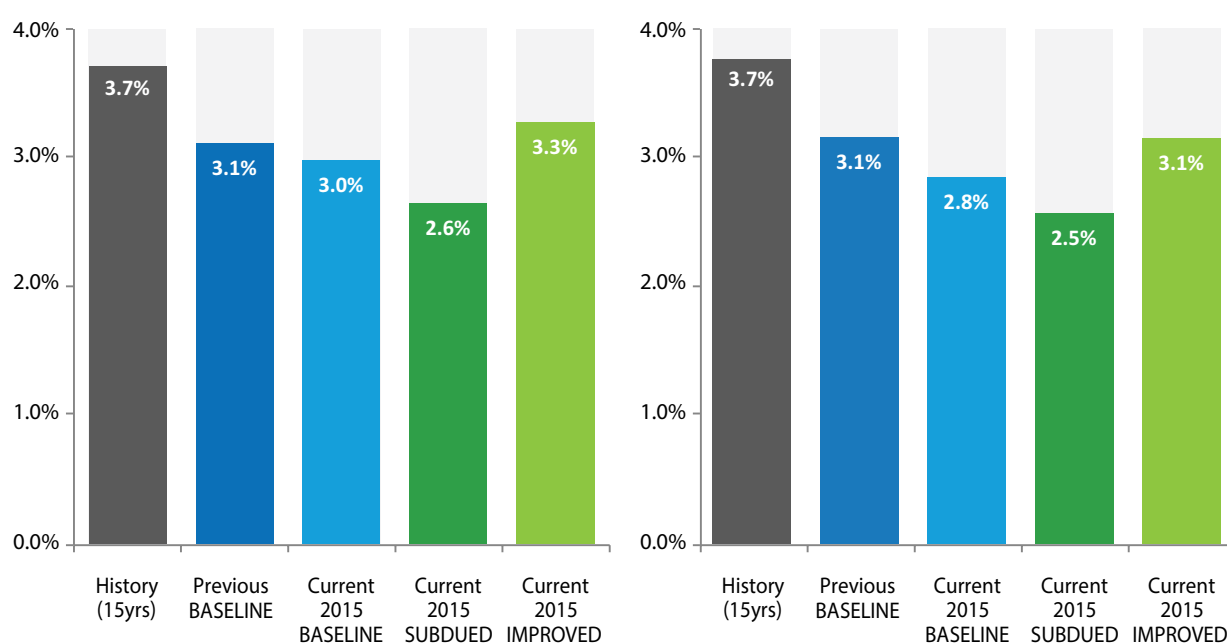
7.9 Health Care and Social Assistance

Employment Outlook

According to the Commission's interim modelling, employment in the Health Care and Social Assistance industry is projected to increase 3 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 3.7 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth above the State average. As a result, its share of the State's employment is projected to rise from 14.9 percent to 17.7 percent.

**Figure 48 - Health Care & Social Assistance, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



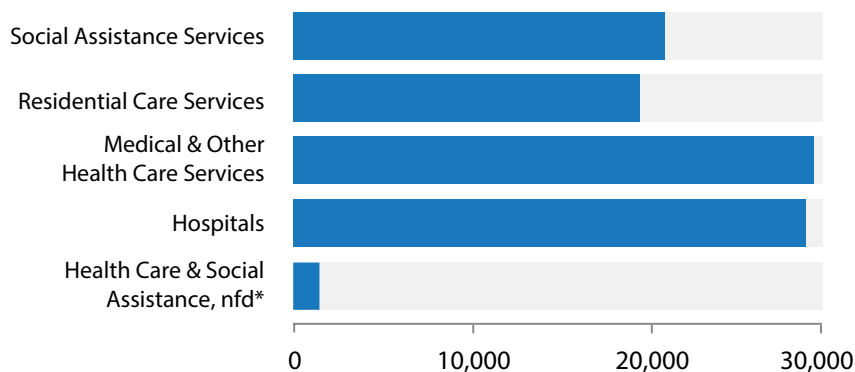
Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

In the year to August 2015 there were 120,500 people employed in the Health Care and Social Assistance Industry, accounting for 15 percent of the South Australian workforce and a 17,000 person increase since 2010. Over the same period, the number of persons employed in the South Australian workforce has increased by 6,700 (or 0.8 percent)³². It is projected that 229,400 new jobs will be created in the Community Services and Health Industry between 2013 and 2018³³.

As a personal services industry, this growth pattern is expected to be consistent with population distribution and will continue as providers transition to new models of service delivery largely driven by Governments introducing new funding models to improve efficiency while still providing choice and quality services to clients. Overall, funding for care and support services is becoming more contestable with a greater emphasis on financial contributions from consumers.

Figure 49 - Health Care & Social Assistance, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Demand for health and community services continues to grow. The ageing population is expected to increase demand for aged care and related services; population growth is expected to increase demand for early childhood education and care; and mental health services are predicted to increase between 135 and 160 percent by 2027³⁴.

Improving productivity is essential if the Health Care and Social Assistance Industry is to contain the costs associated with an ageing population. Advancements in the use of technology are acknowledged as the major source of increases to productivity, particularly in health care. However, in a human services industry, technological advances cannot respond to all needs. The direct interface between workers and consumers is critical to quality care, prevention of illness and injury, and to effective early intervention³⁵.

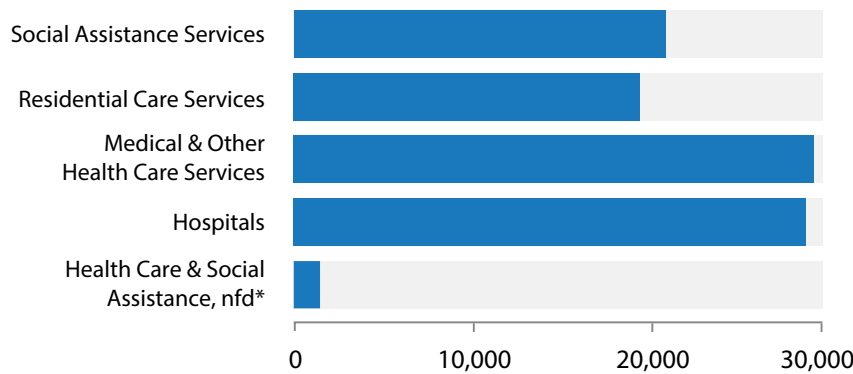
The share of female employment in this sector has held consistently at 78 percent since 2010 and 50.5 percent of the workforce is employed full-time³⁶. These patterns largely reflect a traditional view of females in 'caring' roles and that much of the work is personal service provision to meet individual client needs.

In general, the Health Care and Social Assistance Industry is older than the South Australian workforce, with higher proportions (50.2 percent) of people aged 45 years and older, compared to 42.2 percent of the South Australian workforce³⁷.

32 - <http://workforcewizard.skills.sa.gov.au/ReportResult.aspx>
33 - http://www.cshisc.com.au/media/373197/EScan_2015_FULL_VERSION.pdf

34 - http://www.cshisc.com.au/media/373197/EScan_2015_FULL_VERSION.pdf
35 - http://www.cshisc.com.au/media/373197/EScan_2015_FULL_VERSION.pdf
36 - <http://workforcewizard.skills.sa.gov.au/ReportResult.aspx>
37 - *ibid*

Figure 50 - Health Care & Social Assistance, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Skills needs

Survey respondents ranked the Administration and Support skills cluster as having the highest importance, followed by the Managerial and Leadership and then the Sales and Customer Service skills clusters. This is consistent with the service nature of this work and the moves to greater consumer choice, which is driving providers to differentiate themselves in the marketplace.

Entrepreneurial and Sustainability and Environmental skills clusters were ranked of lowest importance by the Health Care and Social Assistance Survey respondents.

Table 19 - Health Care & Social Assistance, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Administration & Support	1	5	↑
Managerial & Leadership	2	1	↓
Sales & Customer Service	3	2	↓
Work Health & Safety (WHS)	4	4	↔
Information & Technology	5	3	↓
Human Resources	6	8	↑
Language, Literacy & Numeracy (LLN)	7	10	↑
Marketing & Engagement	8	7	↓
Financial	9	6	↓
Sustainability & Environmental	10	9	↓
Entrepreneurial	11	11	↔

Workforce development themes and issues

As industry adapts to a new funding and service delivery environment, there is evidence of increased demand for different roles and specific skills. To meet this increased demand industry will need more workers. It is expected that one in every four new jobs created between 2013 and 2018 will be in the Community Services and Health Industry³⁸. There is also evidence of increased demand for specific skills and changing roles.

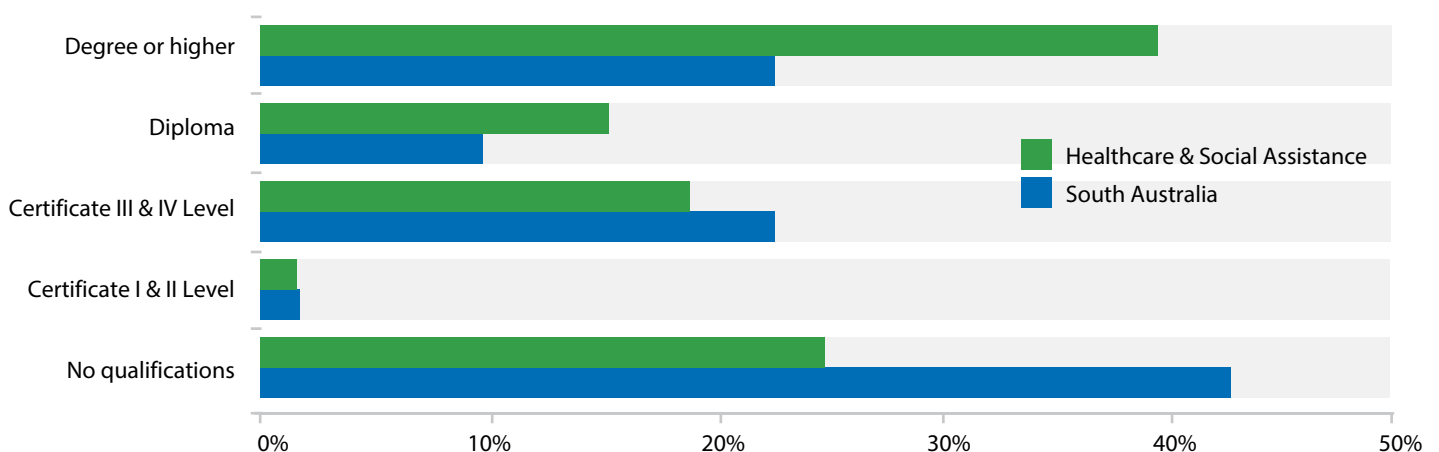
Industry stakeholders have identified the following key trends:

- increased scope of support worker roles in aged care and disability to have a complex mix of diverse skills
- emerging demand for care coordination roles
- continuing demand for workers to develop existing skills and acquire new ones (in some cases leading to the development of advanced care roles)
- increased demand for skills in business leadership, management and administration; and
- greater emphasis on technological knowledge and skills.

The Health Care and Social Assistance Industry is more qualified than the greater South Australian workforce, with 73.7 percent of people with Certificate III or higher qualifications, compared to the greater South Australian workforce with 55.5 percent. In 2014, there were 17,826 students in VET courses related to the Health Care and Social Assistance Industry following a peak of 22,000 in 2013.

These enrolments account for 13.7 percent of VET enrolments in South Australia, despite declines in Apprentice and Trainee commencements³⁹. This trend is expected to continue as more assistant roles are created to mitigate rising labour costs and shortages in University qualified workers. Demand by Culturally and Linguistically Diverse (CALD) consumers is expected to increase demand for CALD workers, particularly in aged care.

Figure 51 - Health Care & Social Assistance, Employment Share by Post-School Qualification Level



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

38 - http://www.cshisc.com.au/media/373197/EScan_2015_FULL_VERSION.pdf

39 - *ibid*

Work placements are crucial to the acquisition of competencies and the assessment of skills and knowledge in a relevant workplace context and this is now reflected in a number of the qualifications in the recently revised Training Packages. These new qualification requirements will place additional burden on RTOs already reporting difficulties sourcing appropriate placements in community services and health organisations, which are unfunded and rely on a great deal of goodwill from employers.

Employers seek those with experience but are reluctant to invest in developing new recruits because of the complexity of employment practices as a result of regulatory requirements. Service providers, who are largely not-for-profit organisations, need access to funding to support workforce development activities. Service providers in regional areas who are often particularly vulnerable to skills shortages need to invest in innovative and collaborative solutions to meet their workforce needs.

Industry Priority Qualifications

The Health Care and Social Assistance Industry received a total of 78 responses Survey. This was slightly below the target number of responses for this Industry, although it received the highest number of responses across all industries. The sub-sector distribution for the Industry was acceptable.

This Industry had a significant share of micro employers, but also contained more large employers than other industries. Almost half of the employers reported likely additions to staff in the short to medium-term.

Stakeholders made several changes to qualifications in this Industry, based on their insight into sector growth areas.

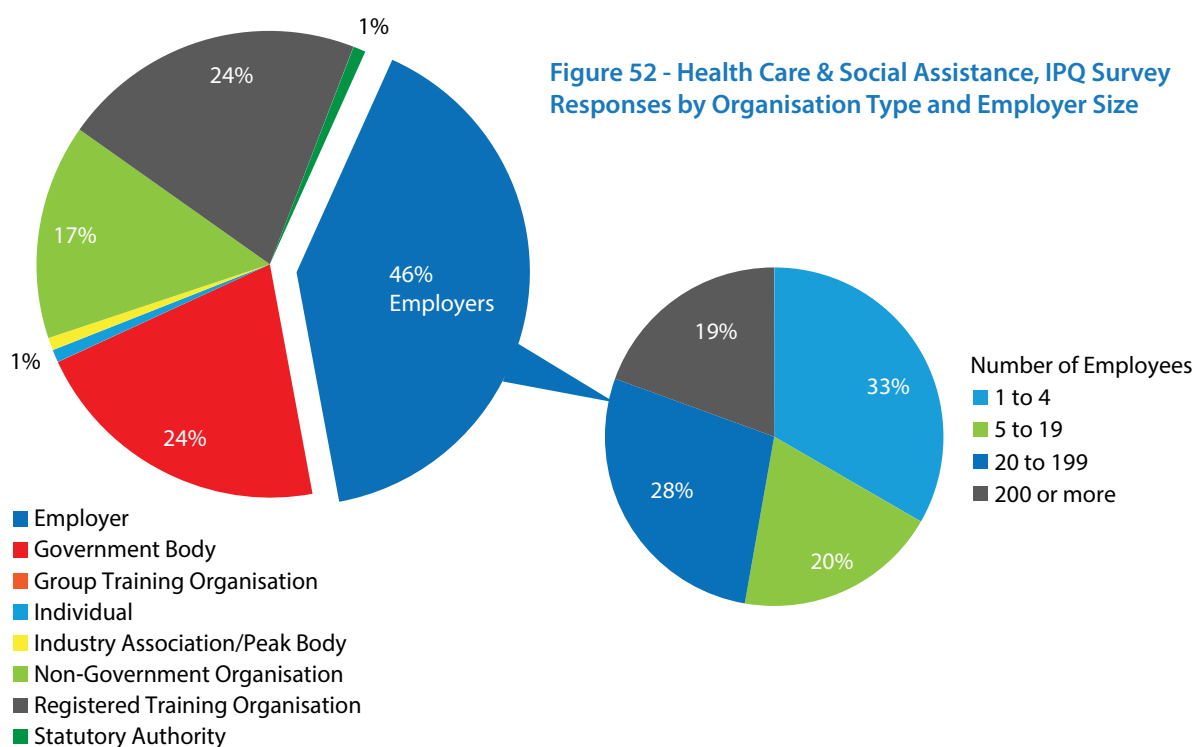


Table 20 - Health Care & Social Assistance, Prioritised Qualifications

Health Care and Social Assistance

Tier 1

Advanced Diploma of Nursing (Enrolled/Division 2 nursing)
 Diploma of Nursing (Enrolled-Division 2 nursing)
 Certificate IV in Health Administration
 Certificate IV in Mental Health
 Certificate III in Aged Care
 Certificate III in Disability
 Certificate III in Home and Community Care

Tier 2

ADiploma of Leadership and Management
 Certificate IV in Aged Care
 Certificate IV in Disability
 Certificate IV in Leadership and Management
 Certificate III in Health Services Assistance
 Certificate III in Business
 Certificate III in Business Administration
 Certificate III in Community Services Work
 Certificate III in Health Administration
 Certificate II in Health Support Services

Tier 3

Advanced Diploma of Dental Prosthetics
 Diploma of Community Services (Case Management)
 Diploma of Community Services Coordination
 Diploma of Counselling
 Diploma of Dental Technology
 Diploma of Practice Management
 Certificate IV in Allied Health Assistance
 Certificate IV in Business
 Certificate IV in Business Administration
 Certificate IV in Community Services
 (Information, advice and referral)
 Certificate IV in Community Services Advocacy
 Certificate IV in Community Services Work
 Certificate IV in Home and Community Care
 Certificate IV in Leisure and Health
 Certificate IV in Work Health and Safety
 Certificate IV in Youth Work
 Certificate III in Allied Health Assistance
 Certificate III in Early Childhood Education and Care
 Certificate III in Health Support Services
 Certificate III in Recordkeeping
 Certificate III in Sterilisation Services
 Certificate III in Work Health and Safety
 Certificate II in Business
 Certificate II in Community Services
 Certificate I in Work Preparation (Community Services)

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset

www.tasc.sa.gov.au





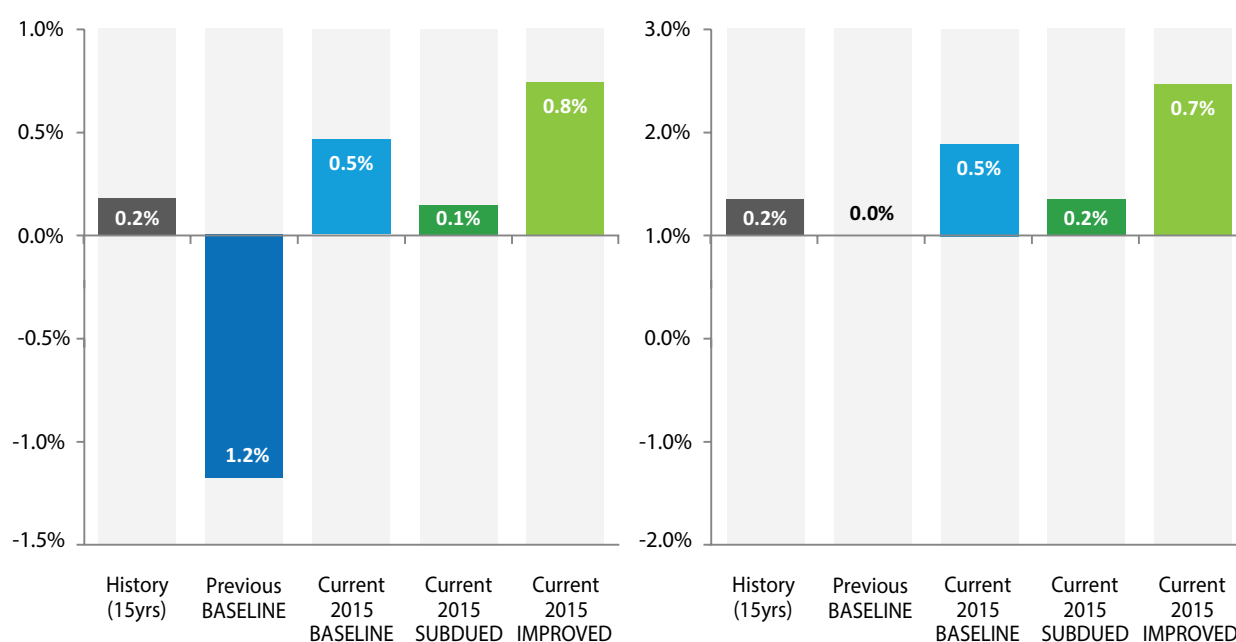
7.10 Information, Media and Telecommunications

Employment Outlook

According to the Commission's interim modelling, employment in the Information Media and Telecommunications industry is projected to increase 0.5 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 0.2 percent per annum.

Over the long-term (2014-15 to 2024-25), the Industry is expected to record continued employment growth below the State average. As a result, its share of the State's employment is projected to decline from 1.5 percent to 1.4 percent.

Figure 53 - Information, Media & Telecommunications, Average Annual Employment Change 2014-15 to 2019-20 and 2014-15 to 2024-25



Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

The Information Media and Telecommunications Industry includes libraries, archives and information services such as news collection. The Industry also includes motion pictures and video activities, sound recording and music publishing, telecommunications network operation and a range of telecommunication services such as paging services and telecommunications reselling.

From the productivity benefits of cloud computing, the transformative impact of smartphone technology and tablet devices and the creation, analysis and security of Big Data, businesses in all industries are utilising Information and Communications Technology (ICT) to streamline processes, improve service offerings and simplify operations.

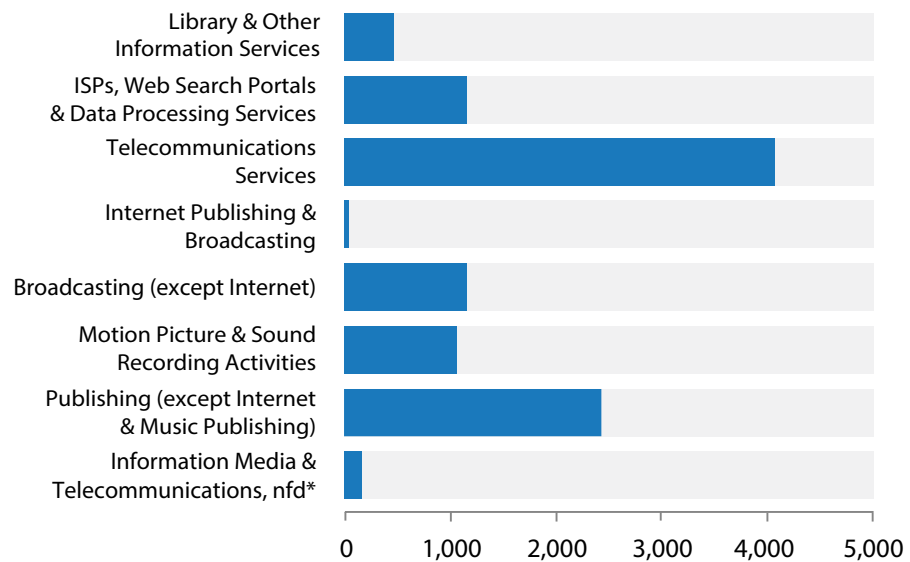
The Australian ICT industry consistently outperforms the economy in servicing business and domestic users – although the boundaries between these users are blurring.

ICT services and professional and technical skills are integral to finance, health, education, transport, resource exploration, manufacturing, tourism, primary and mineral production, data and population security and the sustainable environment.

While some sectors like finance and education embrace digitisation, others run the risk of being left behind.

Artificial intelligence and robotics are not new, with robots replacing many routine jobs, for example, telemarketing, sewing, welding and work that can be solved by smart algorithms such as data entry and data mining. Until recently, robots had not been good at finding patterns, communicating with people, problem solving and using common sense. Data analytics and self-driving cars suggest they might be getting better at pattern recognition with creating additional opportunities to automate various tasks in more industries.

Figure 54 - Information, Media & Telecommunications, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

The application of thermography is expanding into a number of industries, including emergency services, forensics, building sciences and pest control. Customisation of camera technology, to cater for diverse industry sectors is expected to increase productivity by expanding the application of technology. Moreover, technological improvements, such as data interpretation is expected to increase software utilisation and support timely and tactical decision making.

Agile software development is a software development method in which requirements and solutions evolve through collaboration between self-organising, cross-functional teams located anywhere in the world so the best skills can be brought together. While this may pose some risks in terms of more work moving off-shore to less expensive cost centres, it also provides important opportunities to work from anywhere in the world and to provide services to a global marketplace.

Subscription media is a vibrant and creative part of the Industry, capitalising both on the growth of hand held devices and people being time poor. Investment in Australian television productions has almost doubled between 2007 and 2014 and seen the creation of 8,370 jobs⁴⁰.

South Australia's film sector is booming with a creative hub that houses screen industry businesses from casting agents and award winning production companies to animators and game developers⁴¹.

A recent report prepared by Deloitte Access Economics and commissioned by the South Australian Film Corporation found that the South Australian screen industry contributed \$77.2 million to the State's economy in 2013-14 and supported full-time employment for 754 people⁴².

Consultation undertaken as part of that report indicated that professional facilities and a critical mass of skilled workers in the Industry were as important as Government incentives.

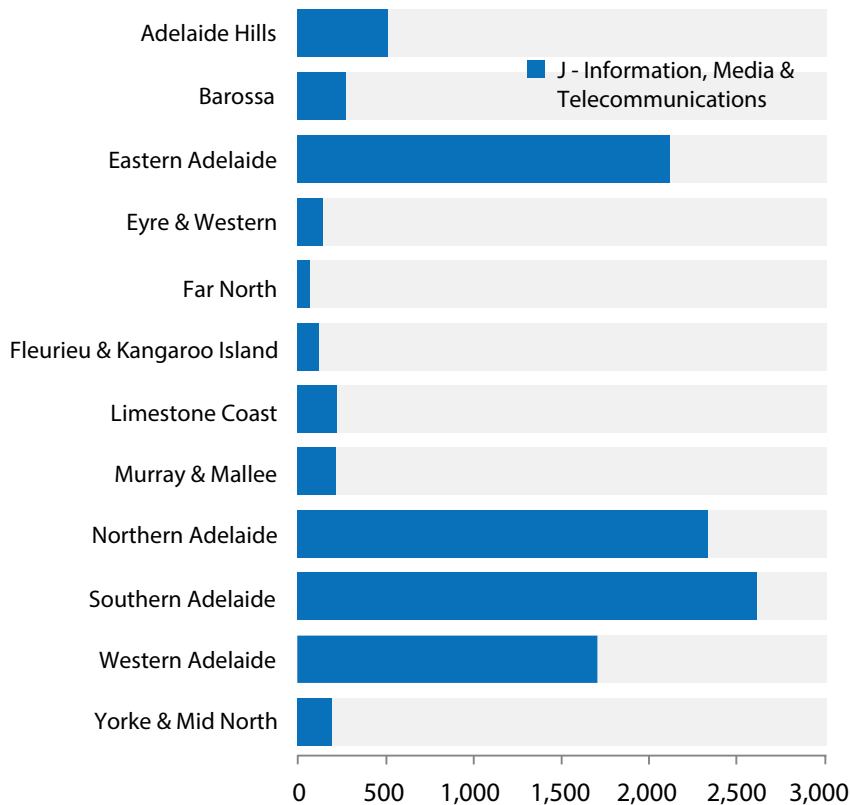
In the 1990's South Australia did well for its size in information technology and telecommunications largely underpinned by Government initiatives, established industry and employers, including defence and well regarded education providers and extensive research programs. Now the state faces a fragmented industry, with weak enrolments in Science, Technology, Engineering and Mathematics (STEM) at all three education levels.

40 - <http://www.astra.org.au/industry/investment-and-jobs>

41 - <http://www.safilm.com.au/files/nrpercent20SAFCpercent20Newpercent20Adelaidepercent20Studiospercent20Tenantspercent20010915.pdf>

42 - <http://www.safilm.com.au/pdfs/150408-FINALREPORT-Deloitte.pdf>

Figure 55 - Information, Media & Telecommunications, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Skills needs

Survey respondents ranked the Information and Technology skills cluster as having the highest importance, followed by Sales and Customer Service and then the Managerial and Leadership skills clusters. Despite much reporting on the impact of technology in the workplace, this is the only industry that ranked it as the highest priority and one of only six industries to rank the Information and Technology skills cluster in the top three in terms of importance.

Sustainability and Environmental and Work Health and Safety (WHS) skills clusters were ranked of lowest importance by the Information Media and Telecommunications Survey respondents, which is consistent with other 'white collar' industries such as Financial and Insurance Services.

Table 21 - Information, Media & Telecommunications, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Information & Technology	1	3	↑
Sales & Customer Service	2	2	↔
Managerial & Leadership	3	1	↓
Marketing & Engagement	4	7	↑
Entrepreneurial	5	11	↑
Administration & Support	6	5	↓
Language, Literacy & Numeracy (LLN)	7	10	↑
Human Resources	8	8	↔
Financial	9	6	↓
Work Health & Safety (WHS)	10	4	↓
Sustainability & Environmental	11	9	↓

Workforce development themes and issues

Chief Information Officers (CIOs) across a range of industries have indicated the following key considerations for the next twelve months:

- all CIOs surveyed are utilising outsourcing, offshoring and cloud services to some extent
- priorities include mobility, cloud services, digital and Big Data
- more than a third expected to increase their technology professionals with the top three skills priorities required (in 2014) being business analytics, service management and agile software development; and
- they anticipated the following skills shortages and gaps: cloud services, digital marketing, ecommerce, soft skills e.g. communication as well as leadership and business acumen⁴³.

The ability to take data – to understand it, process it, extract value from it, to visualise it, communicate it – is going to be an essential skill in the coming decades, not only at the professional level but also in education⁴⁴.

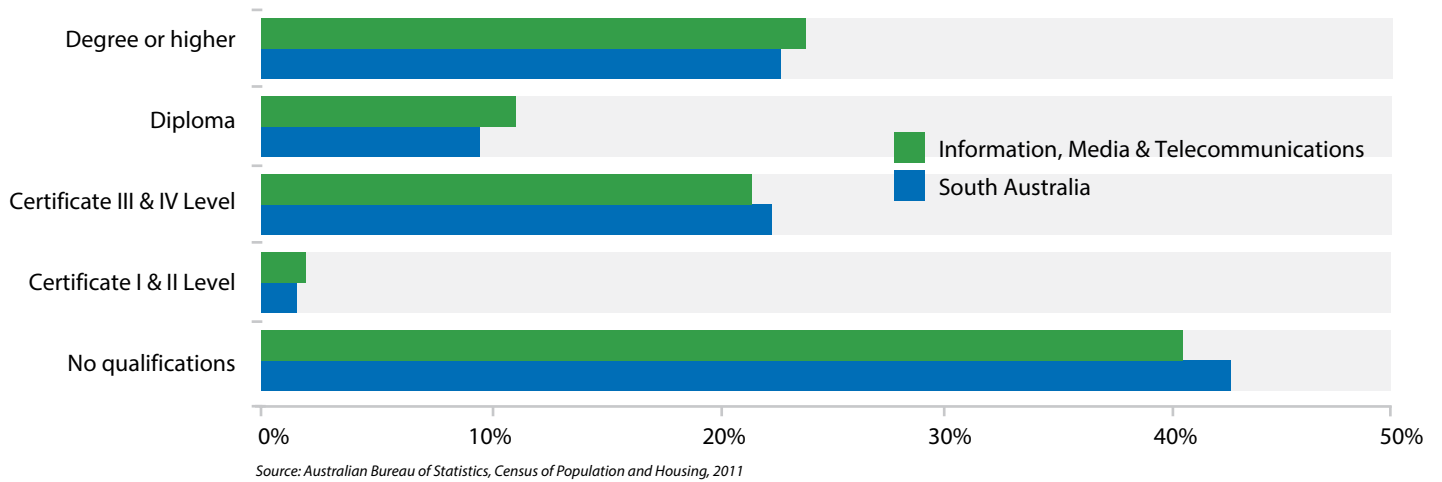
There is evidence to suggest that training is falling into silos which can be unattractive to young people and that by providing training that integrates technologies such as IT, electrotechnology and engineering, new entry pathways may be created for those that might otherwise have not engaged.

With large volumes of work contracted out, the onus has moved in many cases from the employer to the subcontractor to maintain their own skill level. Qualifications can take too long, require learning in some cases perceived as unnecessary, can have doubtful returns on investment and require commitment to a place and time that does not offer the flexibility required and expected by the learner.

⁴³ - Michael Page Technology (2014) CIO Viewpoint, 2014/15

⁴⁴ - www.mckinsey.com/insights/innovation/ha_l_varian_on_how_the_web_challenges_managers. Accessed [8 August 2014].

**Figure 56 - Information, Media & Telecommunications,
Employment Share by Post-School Qualification Level**



Low enrolments and completions in ICT qualifications have plagued the Industry for some time as they are not required by employers who value specialist skills in niche areas. However, lower level qualifications are a critical entry point for a variety of students, particularly for those not traditionally engaged with the Industry. Funding models need to recognise these variations in demand and stimulate careers in the growing Information Media and Telecommunications Industry.

Industry Priority Qualifications

The Information Media and Telecommunications Industry received a total of 41 responses to the Survey. This was one of several industries which received far more responses than the targeted number. Several sectors are overrepresented, including Library and Other Information Services and Internet Publishing and Broadcasting. Respondents in this Industry primarily identified as employers.

The largest share of respondents in this industry identified as small employers. Less than half reported any expected additions to staff in the short to medium-term.

Stakeholders in this industry made several changes to Tiers to adjust for the bias towards the library sub-sector, but had relatively few changes overall. Stakeholders also noted the increasing desire of sector participants to have 'soft skills' in addition to technical skills.

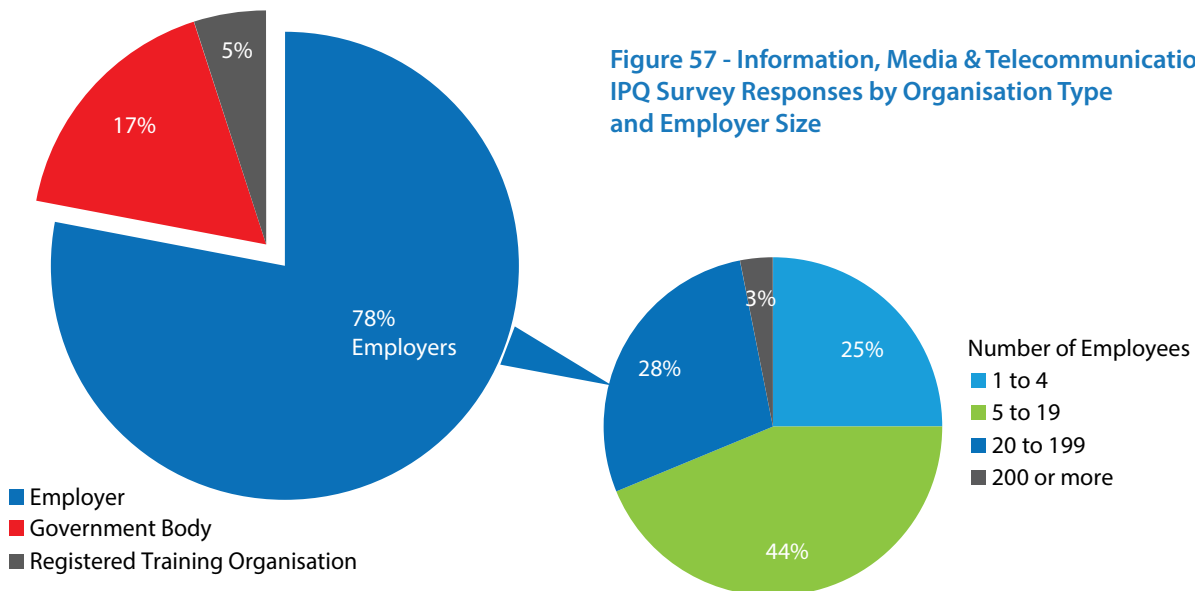


Table 22 - Information, Media & Telecommunications, Prioritised Qualifications

Information, Media & Telecommunications

Tier 1 (Highest Priority)

Diploma of Graphic Design
 Diploma of Website Development
 Certificate IV in Information Technology
 Certificate IV in Library, Information and Cultural Services
 Certificate III in Information, Digital Media and Technology

Tier 2 (High Priority)

Advanced Diploma of Graphic Design
 Advanced Diploma of Leadership & Management
 Diploma of Database Design and Development
 Diploma of Information Technology
 Diploma of Library and Information Services
 Diploma of Software Development
 Certificate IV in Information Technology Networking
 Certificate IV in Marketing
 Certificate IV in Programming
 Certificate IV in Web-Based Technologies
 Certificate III in Customer Engagement
 Certificate I in Information, Digital Media and Technology

Tier 3 (Priority)

Diploma of Human Resources Management
 Diploma of Information Technology Networking
 Diploma of Marketing
 Diploma of Work Health and Safety
 Certificate IV in Business Administration
 Certificate IV in Computer Systems Technology
 Certificate IV in Customer Engagement
 Certificate IV in Human Resources
 Certificate IV in Information Technology Support
 Certificate IV in Leadership and Management
 Certificate III in Business Administration
 Certificate III in Printing and Graphic Arts (Digital Printing)
 Certificate III in Printing and Graphic Arts (Graphic Prepress)
 Certificate III in Printing and Graphic Arts (Print Finishing)
 Certificate III in Work Health and Safety
 Certificate II in Customer Engagement
 Certificate II in Information, Digital Media and Technology

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au





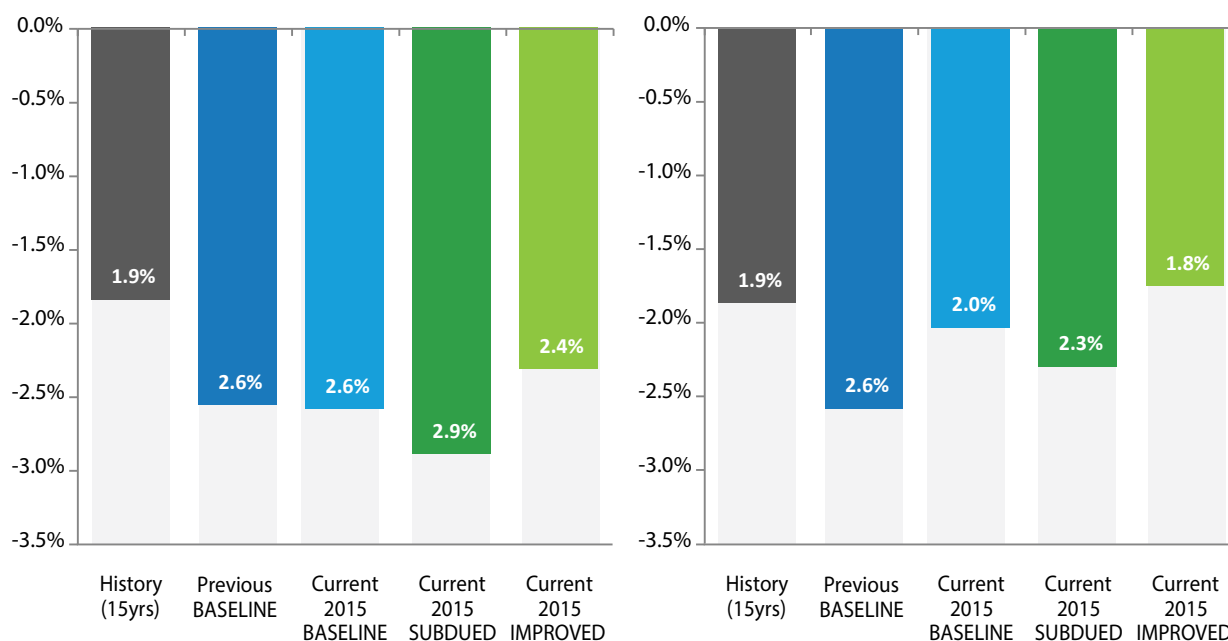
7.11 Manufacturing

Employment Outlook

According to the Commission's interim modelling, employment in the Manufacturing Industry is projected to decrease 2.6 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of -1.9 percent per annum.

Over the long-term (2014-15 to 2024-25), Manufacturing's share of State employment is projected to decline from 8.9 percent to 6.6 percent.

**Figure 58 - Manufacturing, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

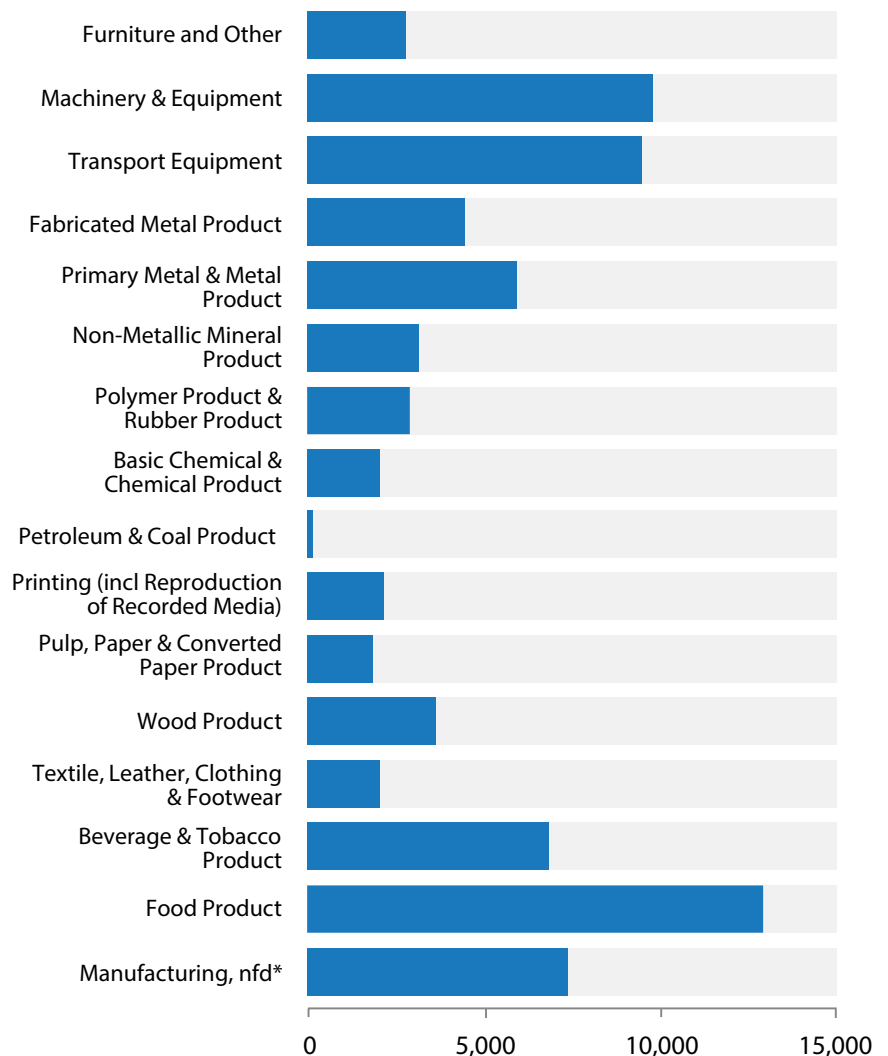
Industry Outlook

Manufacturing is one of the key industry sectors in South Australia, employing 71,500 persons, which accounts for 8.9 percent of the total full-time and part-time employment in the State⁴⁵. In June 2014, South Australia had 3,420 manufacturing businesses with annual revenue over \$200,000⁴⁶. The share of manufacturing in terms of economic activity has declined in recent years; however, the relative performance of the Manufacturing Industry in South Australia over the past five years has been significantly worse than the national average.

The Manufacturing Industry in South Australia was in the past a hallmark of the economy and a proud employer of large numbers of the State's workforce. The decline in manufacturing has, and is, impacting on the State's unemployment rate and in particular pockets of the workforce, such as male full-time employment where the impact has been most prevalent.

Between 2008-09 and 2012-13, manufacturing employment in South Australia declined by 15 percent (compared to a national average of 8 percent), and sales and service income for the Manufacturing Industry declined by 17 percent, compared to a national average of 5 percent⁴⁷.

Figure 59 - Manufacturing, Employment by Sub-Sector



⁴⁵ - Frost and Sullivan, 2015, *Assessment of the Manufacturing Works Program*, Department of State Development SA.

⁴⁶ - *ibid*

⁴⁷ - *ibid*

Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

The State Government's Automotive Supplier Diversification Program supports automotive supply chain companies to diversify into alternative revenue streams. The Automotive Workers in Transition Program is available to advise and re-train workers from supply companies planning to diversify, or close.

The broader picture of manufacturing shows that between June 2001 and June 2014, there was a reduction of manufacturing businesses nationally of 8.7 percent. Interestingly for the same period, 65 percent of businesses that were actively trading in June 2010 were still operating in June 2014⁴⁸. Although manufacturing has been significantly impacted by automation, there is still some way to go with the Manufacturing Industry still showing potential for further automation.⁴⁹

Manufacturers are embracing advanced technologies and efficiency practices to increase productivity and gain a competitive advantage. Disruptive technologies such as 3D printing, lasers and Big Data are set to transform Manufacturing Industry sectors.

Food production and food exports are growing in South Australia with recent agreements signed to export flour products to India and dairy and seafood products to China⁵⁰. An advanced food manufacturing centre planned for Northern Adelaide producing ready-made meals for export is expected to create local jobs that may well suit automotive workers.

Health Industries South Australia is expecting to capitalise on the southern hemisphere's largest health and biomedical precinct and promote South Australia as a destination of choice for health care industries.

In 2014, the Australian Biotech Industry was ranked fourth in the world⁵¹. South Australia's biotech hub at Thebarton allows research and high tech companies to co-exist.

The opening of the Tonsley precinct on the old Mitsubishi site heralds a new wave for innovation and manufacturing with companies such as Siemens opening a new world-class maintenance and repair facility and a medical devices hub.

A review of the State Government Manufacturing Works Program has shown 290 incremental jobs which represents a 1.9 percent increase for the participating organisations compared to an overall decline of 5.2 percent for the Manufacturing Industry in South Australia between 2011-12 and 2012-13.

48 - <http://www.abs.gov.au/ausstats/abs@.nsf/mf/8165.0>

49 - Department of Industry and Science Research Paper, 2015, *A rising tide: automation within Australia's labour market*, Australian Government

50 - <http://www.abc.net.au/news/2015-08-25/south-australian-food-processing/6723628>

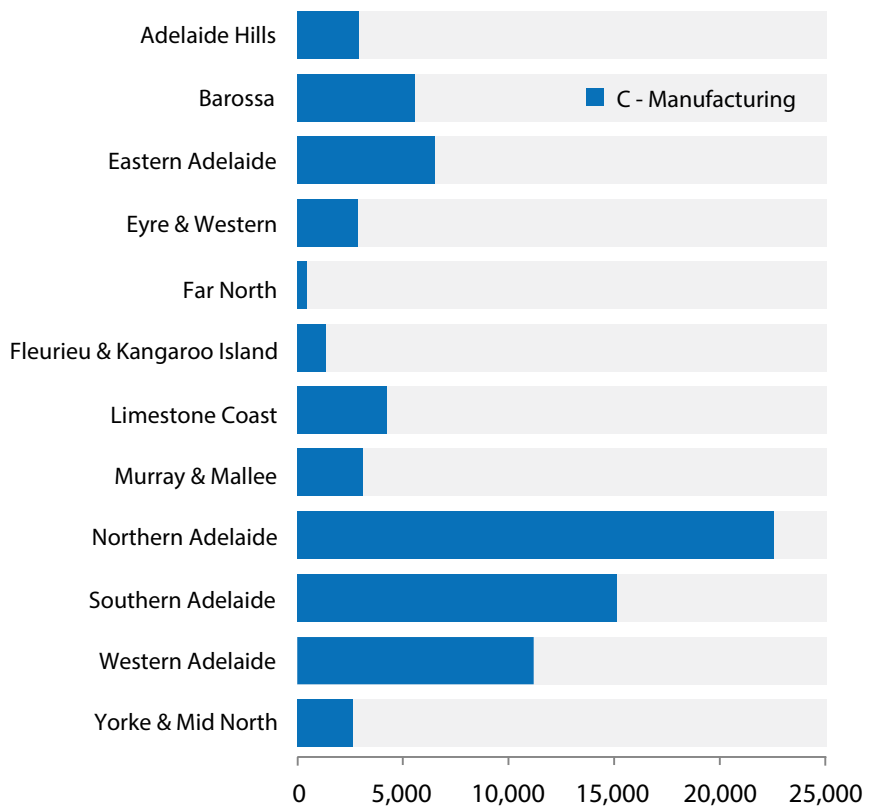
51 - <http://www.mskills.com.au/DownloadManager/downloads/MSApercent20EScanpercent202015.pdf>

The State's Defence Industry directly and indirectly employs around 27,000 people, a significant increase since 2003 when employment in the sector was only 16,000. South Australia's Defence Industry captures a quarter of the Australian Government's in-country spend (around \$1.8 billion per annum). The State Government aims to increase the Defence Industry's annual contribution to our economy to \$2.5 billion and employment to 37,000 people by 2020.⁵²

Defence Industry stakeholders are actively campaigning for the future submarines to be assembled in South Australia utilising existing assets such as those available at Techport. Bringing forward the Future Frigates Program to replace the ANZAC class frigates saves over 500 jobs, commencing in October 2015.

The recent announcement to build the Navy's Future Frigates and Offshore Patrol Vessels in Adelaide, while a positive step forward, is not expected to go far enough to providing a truly continuous, long-term plan that sustains the local sector into the future.

Figure 60 - Manufacturing, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

⁵² - <http://www.premier.sa.gov.au/images/policies/Our-Jobs-Plan.pdf>

Skills needs

Survey respondents ranked the Managerial and Leadership skills cluster as having the highest importance, followed by the Information and Technology and then the Work Health and Safety (WHS) skills clusters. This is not surprising given the current state of manufacturing and the impact of technology on sustainability.

The absence of the Entrepreneurial skills cluster in the top three could be accounted for by a number of factors, including a lack of understanding of entrepreneurial skills and/or their application to manufacturing, or indeed other priorities.

Language, Literacy and Numeracy (LLN) and Human Resources skills clusters were ranked of lowest importance by manufacturing Survey respondents. The low ranking of LLN skills is somewhat surprising given the rhetoric regarding manufacturing workers often having difficulties reskilling to other industries because of LLN issues.

Workforce development themes and issues

The Automotive Manufacturing Industry's operations through to 2017 are largely depending on access to a skilled workforce. Staff retention and morale is critical to continued operations.

Of the workers who exited the automotive manufacturing sector between 2006 and 2011, around three quarters had found employment in another sector in 2011, a further 20 percent were not in the labour force, and 5 percent were unemployed. The experience of automotive workers currently facing redundancy may be worse than those who exited the sector over the five years to 2011, due to the likely simultaneous influx of retrenched workers into the labour market and the persistence of soft labour market conditions as the mining boom unwinds and defence sector opportunities remain unclear⁵³.

With large numbers of automotive manufacturing workers aged over 50 and likely to find redundancy packages attractive, and a generally ageing manufacturing workforce, concerns exist that their skills may be lost, not just now, but for future generations.

Some skills for manufacturing are within niche areas of specialty, or thin markers that require a small number of critical skills. Cuts to government subsidies make these courses targets for cost cutting and less attractive to providers. There are currently no RTOs that deliver locksmithing, jewellery or foundry skills in South Australia⁵⁴.

Table 23 - Manufacturing, Ranked Skills Clusters

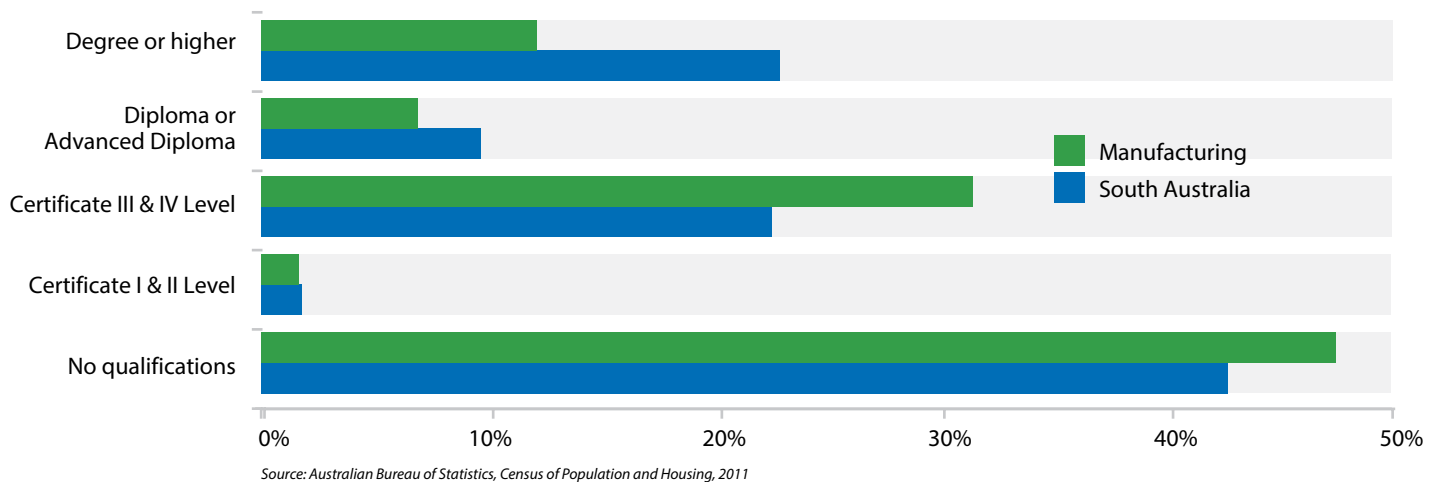
Skills Clusters	This Industry	All Respondents	Compare
Managerial & Leadership	1	1	↔
Information & Technology	2	3	↑
Work Health & Safety (WHS)	3	4	↑
Sales & Customer Service	4	2	↓
Marketing & Engagement	5	7	↑
Financial	6	6	↔
Administration & Support	7	5	↓
Entrepreneurial	8	11	↑
Sustainability & Environmental	9	9	↔
Human Resources	10	8	↓
Language, Literacy & Numeracy (LLN)	11	10	↓

⁵³ - Department of Employment, 2015, Labour market outcomes of people exiting Motor Vehicle and Motor Vehicle Part Manufacturing.

⁵⁴ - <http://www.mskills.com.au/DownloadManager/downloads/MSApercent20EScanpercent202015.pdf>

A flexible and highly skilled workforce is fundamental to manufacturing's success. Skill needs are changing and those who can adapt, problem solve, think creatively and work across traditional skill boundaries are sought. Science, Technology, Engineering and Mathematic (STEM) skills underpin future manufacturing.

Figure 61 - Manufacturing, Employment Share by Post-School Qualification Level



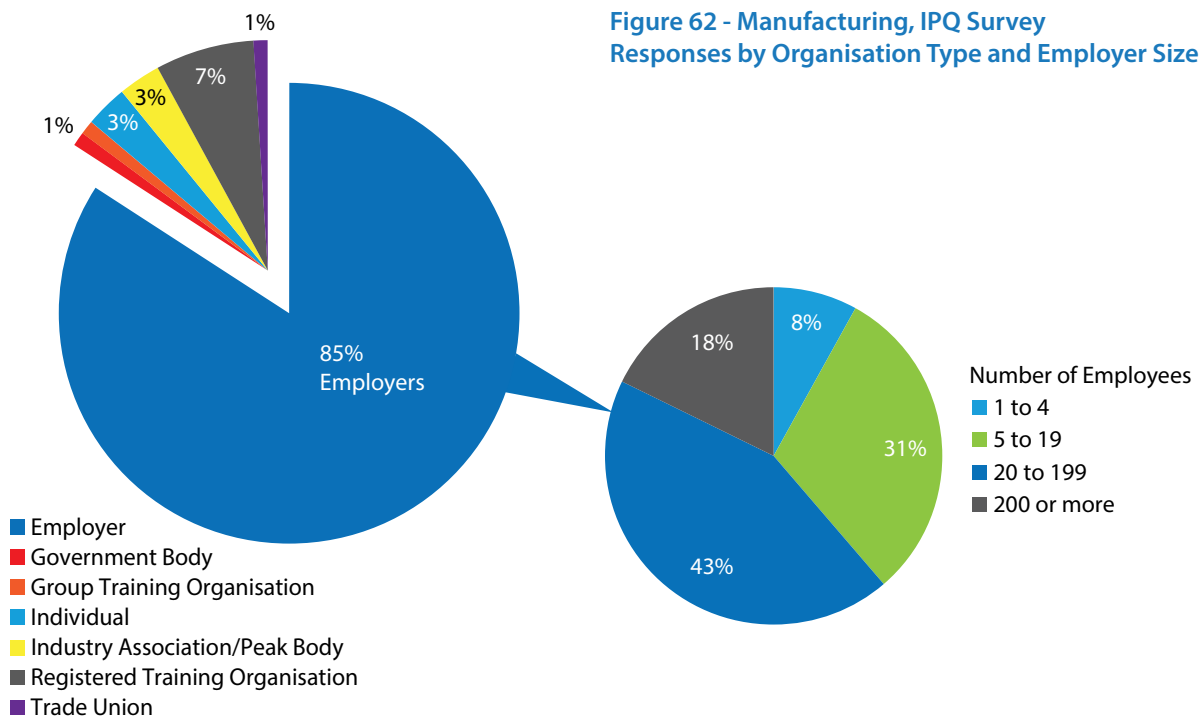
High-level technical skills in robotics, advanced technologies such as additive manufacturing, Computer Aided Design (CAD), Computer Numeric Controlled (CNC) machining and programming are required for manufacturing to be globally competitive.

Australia has the existing skills and capabilities to build and maintain the entire shipbuilding fleet – naval and non-naval, locally. If these highly skilled jobs are lost now, it will be challenging to replace them in the future. It has been reported that the ASC has already cut 300 jobs from their workforce since May 2015 and is expecting to shed another 500 workers by the end of 2016⁵⁵.

⁵⁵ - <http://indaily.com.au/business/2015/10/20/asc-warns-of-500-job-losses-to-come/>

Industry Priority Qualifications

The Manufacturing Industry received a total of 73 responses to the Survey. This was slightly below the target, but was the second highest number of responses for an Industry. Responses were highly concentrated in employers. The sub-sector distribution for the Industry highlighted overrepresentation by Fabricated Metal Product Manufacturing and Food Product Manufacturing.



Small to medium employers dominated the responses in this industry. Over two-thirds of employers reported likely additions to staff in the short to medium-term.

Stakeholders had some difficulty with the qualifications in this industry, particularly due to the diverse nature of the sub-sectors, which includes strongly variable employment outlooks. Significant discussions around the Priority Qualifications for the Industry resulted in a number of changes to the Tiers.

Table 24 - Manufacturing, Prioritised Qualifications

Manufacturing

Tier 1 (Highest Priority)

Certificate IV in Work Health and Safety
 Certificate III in Engineering - Composites Trade
 Certificate III in Engineering - Electrical/Electronic Trade
 Certificate III in Engineering - Fabrication Trade
 Certificate III in Engineering - Mechanical Trade
 Certificate III in Engineering - Technical
 Certificate III in Food Processing
 Certificate III in Meat Processing (Boning Room)
 Certificate III in Meat Processing (Meat Safety)
 Certificate III in Meat Processing (Slaughtering)
 Certificate III in Retail Baking (Bread)
 Certificate III in Retail Baking (Cake and Pastry)
 Certificate III in Retail Baking (Combined)

Tier 2 (High Priority)

Diploma of Engineering - Advanced Trade
 Diploma of Leadership and Management
 Diploma of Project Management
 Diploma of Work Health and Safety
 Certificate IV in Competitive Systems and Practices
 Certificate IV in Engineering
 Certificate IV in Food Processing
 Certificate IV in Meat Processing (Meat Safety)
 Certificate III in Business Administration
 Certificate III in Cabinet Making
 Certificate III in Engineering - Production Systems
 Certificate III in Furniture Making
 Certificate III in Process Manufacturing
 Certificate II in Engineering
 Certificate II in Food Processing
 Certificate II in Meat Processing (Abattoirs)

Tier 3 (Priority)

Advanced Diploma of Engineering
 Advanced Diploma of Leadership and Management
 Advanced Diploma of Program Management
 Advanced Diploma of Work Health and Safety
 Diploma of Aeroskills (Avionics)
 Diploma of Aeroskills (Non-Destructive Testing)
 Diploma of Aviation Maintenance Management (Avionics)
 Diploma of Business
 Diploma of Engineering - Technical
 Diploma of Food Processing
 Diploma of Human Resources Management
 Diploma of International Business
 Diploma of Marketing
 Diploma of Purchasing
 Certificate IV in Aeroskills (Avionics)
 Certificate IV in Business Administration
 Certificate IV in Leadership and Management
 Certificate IV in Manufacturing Technology
 Certificate IV in Meat Processing (Quality Assurance)
 Certificate IV in Printing and Graphic Arts
 Certificate IV in Project Management Practice
 Certificate III in Aeroskills (Mechatronics)
 Certificate III in Aircraft Life Support and Furnishing
 Certificate III in Aircraft Surface Finishing
 Certificate III in Competitive Systems and Practices
 Certificate III in Information, Digital Media & Technology
 Certificate III in Manufactured Mineral Products
 Certificate III in Meat Processing (General)
 Certificate III in Plant Baking
 Certificate III in Printing and Graphic Arts (Digital Printing)
 Certificate III in Printing and Graphic Arts (Print Finishing)
 Certificate III in Printing and Graphic Arts (Printing)
 Certificate III in Printing and Graphic Arts (Sacks and Bags)
 Certificate III in Wine Industry Operations
 Certificate II in Aircraft Line Maintenance
 Certificate II in Engineering - Production Technology
 Certificate II in Manufacturing Technology
 Certificate II in Process Manufacturing
 Certificate II in Wine Industry Operations

A full list of **Tier 4 (Low Priority)** Industry Prioritised Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au



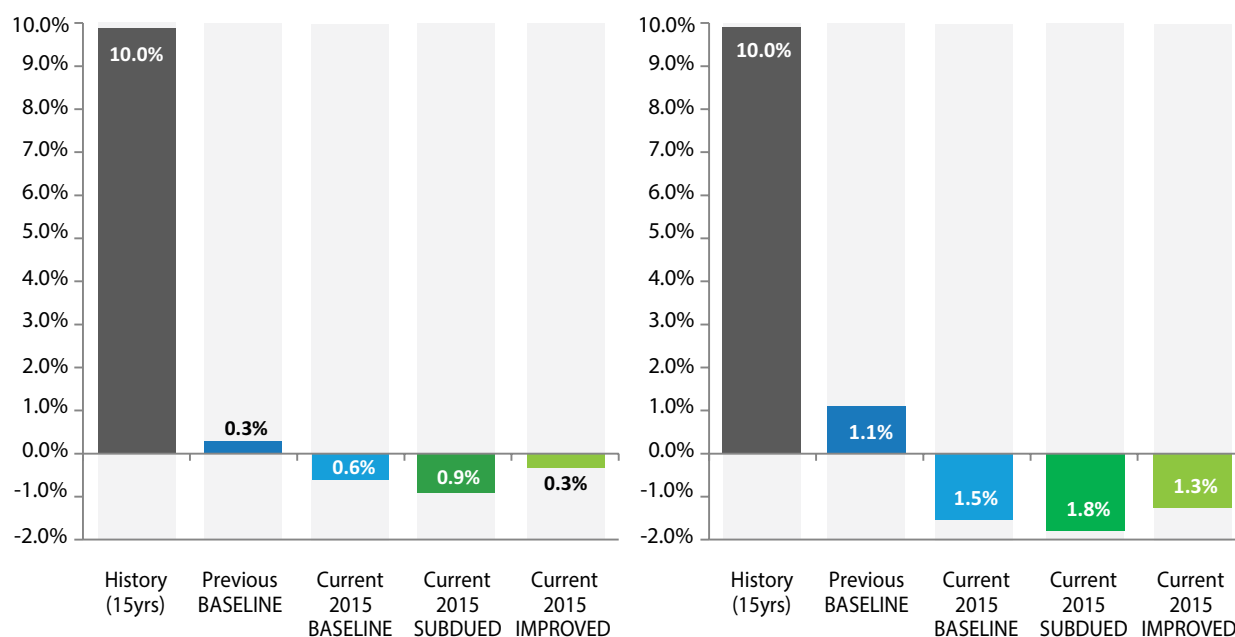
7.12 Mining

Employment Outlook

According to the Commission's interim modelling, employment in the Mining industry is projected to decrease 0.6 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 10 percent per annum.

Over the long-term (2014-15 to 2024-25), Mining's share of State employment is projected to decline from 1.6 percent to 1.3 percent.

**Figure 63 - Mining, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

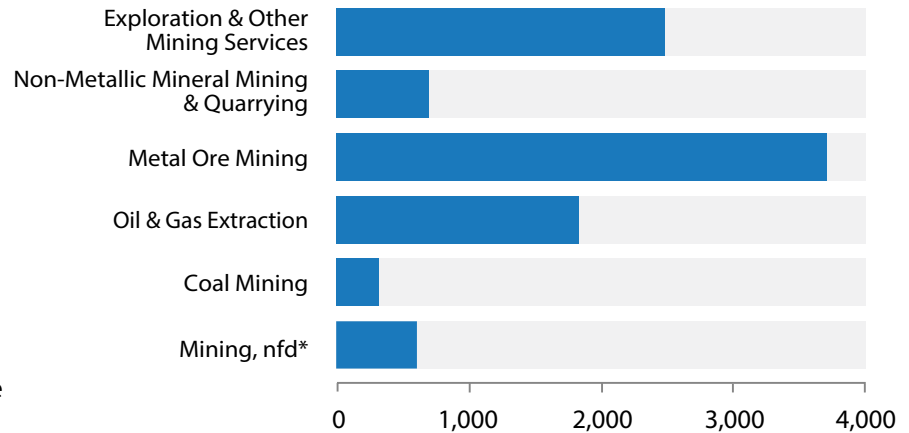
Industry Outlook

Flailing commodity prices, slower growth demand and strong increases in supply have left the previously buoyant Mining Industry to move from a strong investment phase to production, leading to rationalising of operations and, in some cases, mothballing plans in the hope they can weather the storm until prices return to a more stable and realistic level.

Mining investment is forecast to fall by an average of 10 percent per annum over the next four years to a dip of \$55.1 billion by 2017-18, with the Oil and Gas sector being most impacted⁵⁶. Offsetting some of the impact of falling investment will be projects moving from Construction phase into production phase.

The last twelve months have been challenging for the Mining Industry in South Australia, with low commodity prices impacting on revenues. A series of job losses have been announced across the sectors including in the iron ore and oil and gas sectors. The impact is felt not just on those directly employed in the Mining Industry but also those that provide support services such as manufacturing and construction and in regional areas often heavily dependent on mining activity. Head office corporate staff who are often professionals have also been heavily impacted.

Figure 64 - Mining, Employment by Sub-Sector

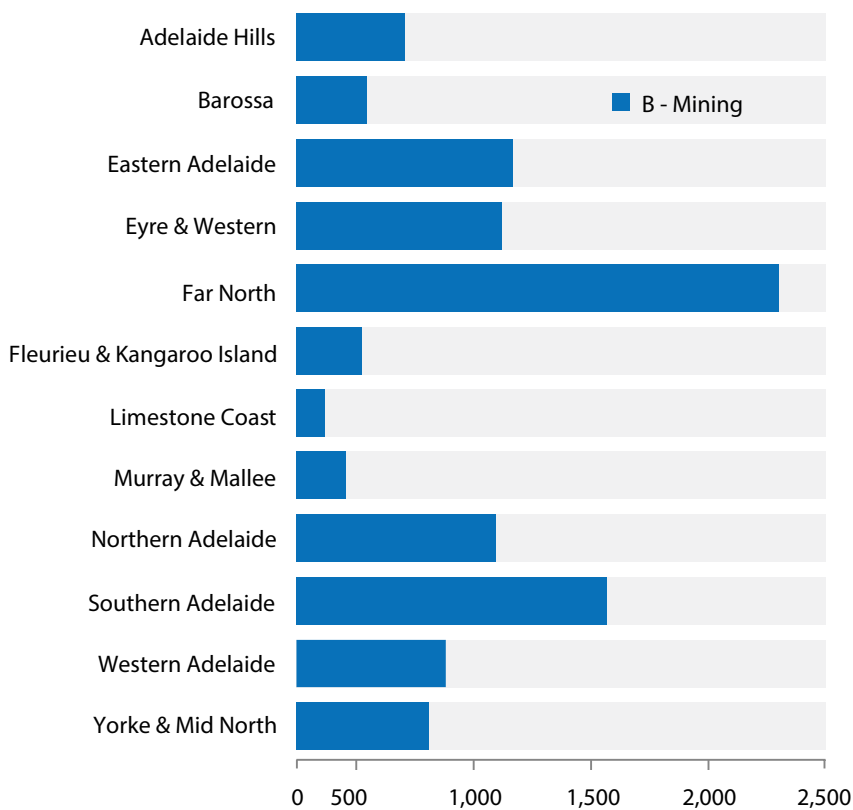


Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Civil infrastructure is impacted by the Mining Industry, in addition to public and private sector investment which has been in decline over recent years. Delays in infrastructure projects, high local construction costs, the outsourcing of front end engineering and design services and the use of module fabrication processes all impact on demand for skills in civil construction.

⁵⁶ - Skills DMC, 2015, Environmental Scan

Figure 65 - Mining, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

In the year to August 2015, the Mining Industry in South Australia employed 12,700 people, accounting for 1.6 percent of the State's workforce with numbers peaking in 2014 at just over 14,000 and 3,000 in heavy and civil engineering. The majority are male and employed full-time, though female participation has increased slightly.

People employed in the Mining Industry are most likely to be employed as machinery operators and drivers, followed by technicians and trades workers. The main qualification held is a Certificate III or IV.

Skills needs

Survey respondents ranked the Work Health and Safety (WHS) skills cluster as having the highest importance, followed by the Financial and then the Human Resources skills clusters. The inclusion of Financial and Human Resources skills clusters in the top three may signify current issues in the Mining Industry around costs and workforce numbers, rather than actual skills.

Entrepreneurial and Language, Literacy and Numeracy (LLN) skills clusters were ranked of lowest importance by the Mining Survey respondents.

Table 25 - Mining, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Work Health & Safety (WHS)	1	4	↑
Financial	2	6	↑
Human Resources	3	8	↑
Managerial & Leadership	4	1	↓
Administration & Support	5	5	↔
Information & Technology	6	3	↓
Marketing & Engagement	7	7	↔
Sales & Customer Service	8	2	↓
Sustainability & Environmental	9	9	↔
Language, Literacy & Numeracy (LLN)	10	10	↔
Entrepreneurial	11	11	↔

Workforce development themes and issues

Research indicates there are no current or forecasted skills shortages in the short-term for the Mining Industry. Attrition over the next ten years is expected to result in demand for Drillers, Miners and Shotfirers, Metal Fitters and Machinists, Other Building and Engineering Technicians and Truck Drivers⁵⁷.

Investing in skills during downturns is not a high priority, yet to retain skills and skilled workers will require investing in skills maintenance and reskilling displaced workers through the use of Skill Sets and qualifications where required. The need for efficiency gains may drive new work methods and talent management and provide opportunities to increase workplace diversity.

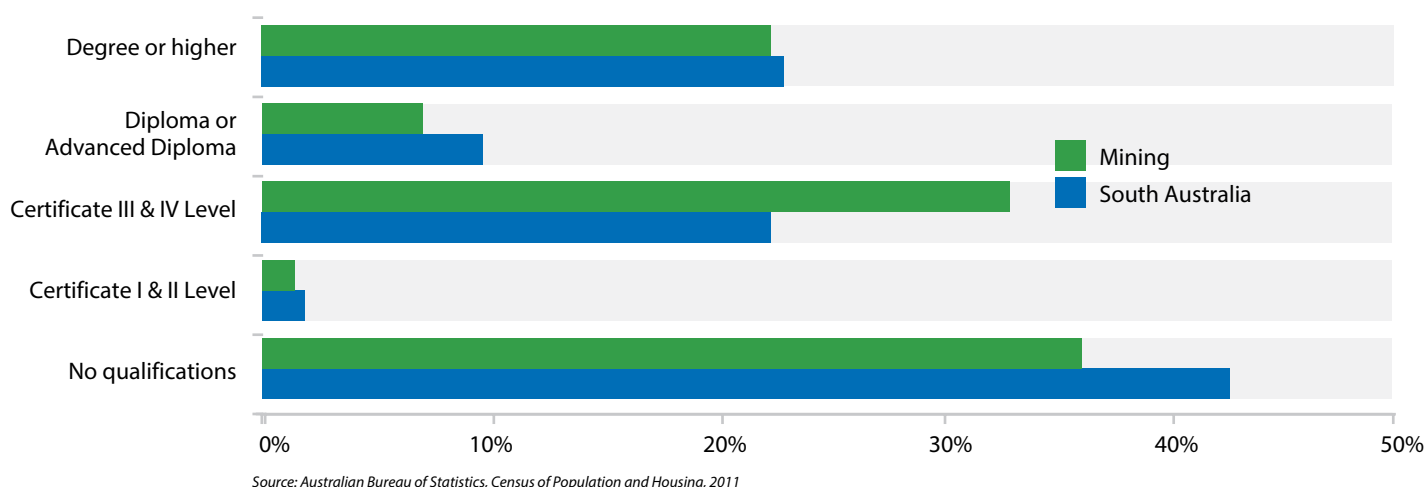
Automation and adoption of new technology, such as driverless trucks, trains and drill rigs will produce new employment opportunities and require upskilling of workers to meet changing industry demand.

Effective workforce planning and development will be required to manage skills needs and ensure gaps arising from the loss of skills and experience is addressed.

The flow on effect of a declining workforce is a reduction in training activity. This impacts the Industry's longer term ability to meet skill requirements but also the ability of training providers to maintain a skilled group of trainers and in some cases their own viability where they provide niche training.

⁵⁷ - *ibid*

Figure 66 - Mining, Employment Share by Post-School Qualification Level



Industry Priority Qualifications

The Mining industry received a total of 10 responses to the Survey. Employers in this Industry are of significant size and the number of responses are reflective of this structure. Respondents in this Industry primarily identified as employers.

Employers in this Industry were equally distributed between small, medium and large businesses. No employers identified as micro-businesses. Only a third of employers expected employment growth in the short-term.

A number of qualifications were adjusted in this Industry. This is likely due to the low response rate, which occasionally meant critical qualifications did not surface to the upper Tiers. Consequently, some of the exploration qualifications (which are highly cyclical) and extraction qualifications received a boost.

Figure 67 - Mining, IPQ Survey Responses by Organisation Type and Employer Size

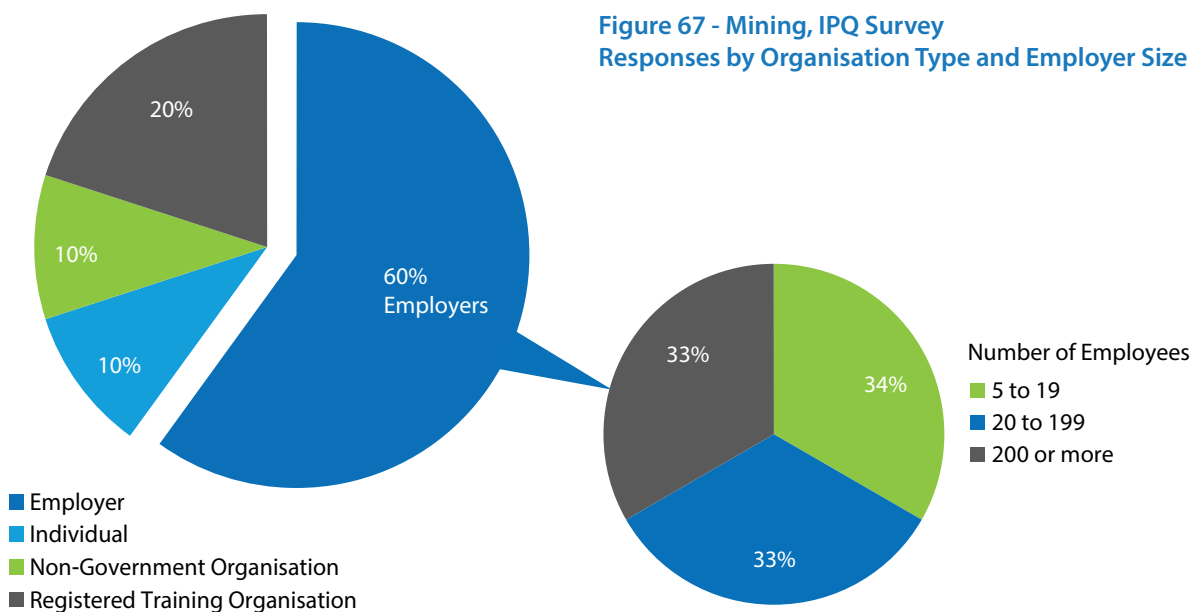


Table 26 - Mining, Prioritised Qualifications

Mining

Tier 1 (Highest Priority)

Certificate IV in Work Health and Safety
 Certificate III in Mine Emergency Response and Rescue
 Certificate III in Surface Extraction Operations
 Certificate II in Emergency Medical Service First Response
 Certificate II in Surface Extraction Operations

Tier 2 (High Priority)

Advanced Diploma of Leadership and Management
 Advanced Diploma of Work Health and Safety
 Diploma of Project Management
 Diploma of Work Health and Safety
 Certificate IV in Project Management Practice
 Certificate IV in Surface Extraction Operations
 Certificate III in Civil Construction
 Certificate III in Drilling Oil/Gas (On shore)
 Certificate III in Drilling Operations
 Certificate III in Resource Processing
 Certificate II in Drilling Oil/Gas (On shore)
 Certificate II in Drilling Operations
 Certificate II in Underground Metalliferous Mining

Tier 3 (Priority)

Advanced Diploma of Accounting
 Advanced Diploma of Business
 Advanced Diploma of Program Management
 Diploma of Accounting
 Diploma of Human Resources Management
 Diploma of Surface Operations Management
 Diploma of Sustainability
 Certificate IV in Accounting
 Certificate IV in Business
 Certificate IV in Business Administration
 Certificate IV in Human Resources
 Certificate IV in Leadership and Management
 Certificate IV in Metalliferous Mining Operations
 (Underground)
 Certificate IV in Resource Processing
 Certificate IV in Small Business Management
 Certificate III in Accounts Administration
 Certificate III in Business
 Certificate III in Business Administration
 Certificate III in Civil Construction Plant Operations
 Certificate III in Conservation and Land Management
 Certificate III in Micro Business Operations
 Certificate III in Mining Exploration
 Certificate III in Underground Metalliferous Mining
 Certificate III in Work Health and Safety
 Certificate II in Business
 Certificate II in Civil Construction
 Certificate II in Resources and Infrastructure Work
 Preparation

A full list of Tier 4 (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset

www.tasc.sa.gov.au





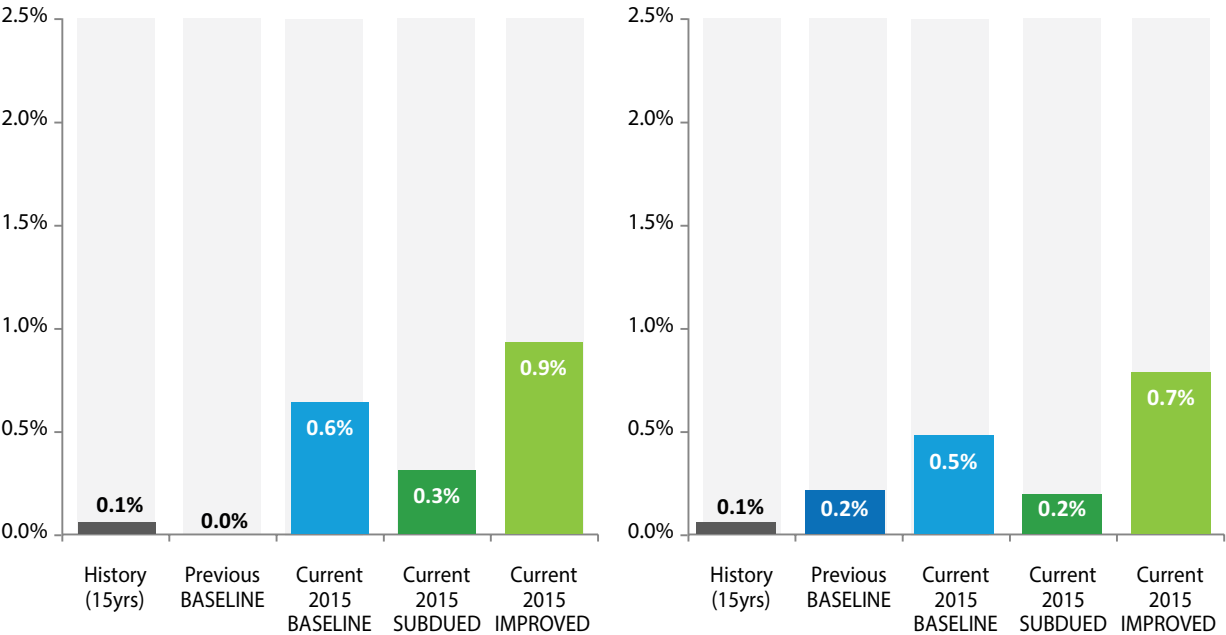
7.13 Other Services

Employment Outlook

According to the Commission's interim modelling, employment in the Other Services industry is projected to increase 0.6 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 0.1 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth below the State average. As a result, its share of the State's employment is projected to decline from 4.0 percent to 3.8 percent.

**Figure 68 - Other Services, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

The hairdressing sector is a customer service business faced with growing pressure to meet customer expectations around high levels of personalised service and the convenience of longer salon opening hours. Barbershops are re-emerging and demand for men’s grooming services growing.

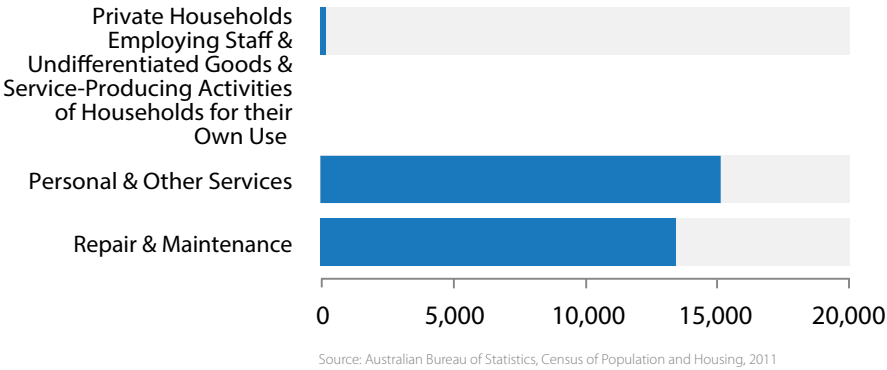
Diversification of services continues with hairdressing often combined with beauty treatments for women and men.

As a personalised service, the impact of technology is not as widespread on the workforce but does offer some improvements such as Wi-Fi for customers, social media marketing and online booking capabilities.

Home hair and beauty salons while providing hairdressers and beauty therapists with flexible work options are seen as tarnishing the professionalism of the Industry and posing some risks to the public in terms of health and safety requirements.

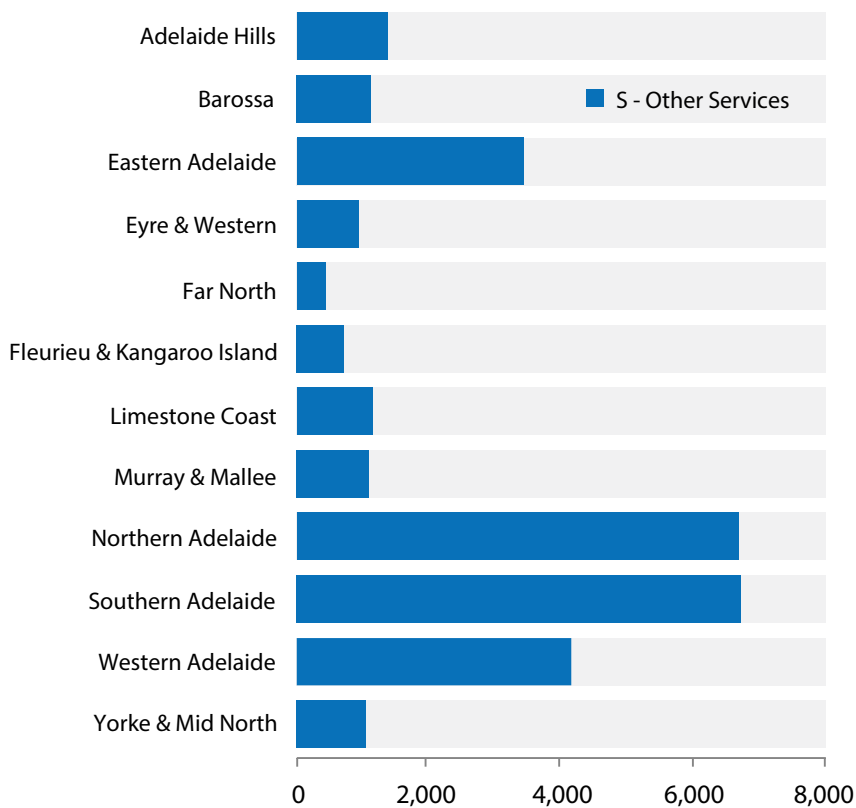
The beauty sector is changing with three business models emerging; traditional salons; those offering specialist treatments, ranging from basic nail bars to high end skin rejuvenation clinics; and spas offering body treatments and wellness experiences.

Figure 69 - Other Services, Employment by Sub-Sector



Activity in the funeral services sector closely parallels South Australia’s ageing population with expectations of a continued increase in demand peaking in the 2030s. The multi-cultural composition of society means greater diversity is required in funeral services. Greater diversity has also led to more cremations, which are traditional in some cultures and are popular among those with no religious affiliation.

Figure 70 - Other Services, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

The number of motor vehicle repair and maintenance businesses is in decline. Tight business conditions, constraints in accessing OEM technical servicing and repair information, new industry standards for vehicle body repair workshops, the costs of capital equipment and skills training, retirements and consolidation are all reasons cited by operators for the reduction in businesses⁵⁸.



⁵⁸ - Auto Skills Australia, 2015, Automotive Environmental Escan 2015

Skills needs

Survey respondents ranked the Sales and Customer Service skills cluster as having the highest importance, followed by the Marketing and Engagement and then the Managerial and Leadership skills clusters.

Language, Literacy and Numeracy (LLN) and Entrepreneurial skills clusters were ranked of lowest importance by respondents in the Other Services Industry.

Table 27 - Other Services, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Managerial & Leadership	1	2	↑
Sales & Customer Service	2	7	↑
Information & Technology	3	1	↓
Administration & Support	4	4	↔
Entrepreneurial	5	5	↔
Marketing & Engagement	6	3	↓
Human Resources	7	6	↓
Financial	8	8	↔
Work Health & Safety (WHS)	9	9	↔
Sustainability & Environmental	10	10	↑
Language, Literacy & Numeracy (LLN)	11	11	↓

Workforce development themes and issues

Hairdressing and beauty salon staff need to be well trained in managing client expectations and providing high levels of customer service. The sectors report problems finding suitable Apprentices and attracting skilled staff, particularly in some regional areas.

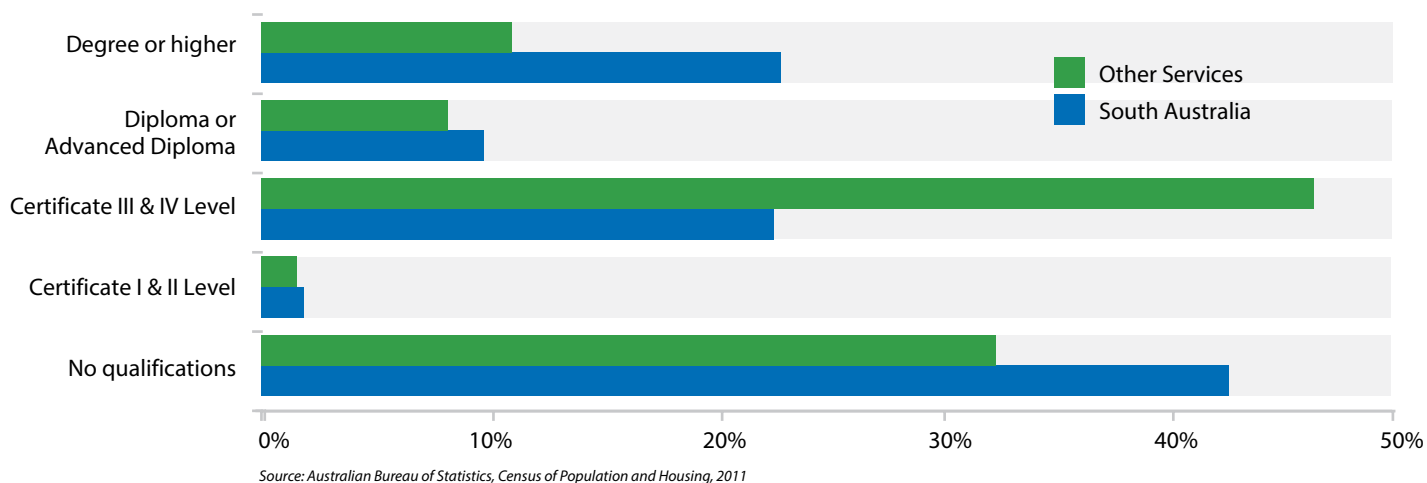
Low Apprenticeship commencements and completions pose problems for the sector longer term as do large fluctuations in subsidies, as seen during the Skills for All funding.⁵⁹

Unless part of a chain, salons are usually small businesses who use non-accredited training from product companies to upskill. Salon managers need business skills, particularly those around financial management and compliance.

Qualified barbers are in short supply with the only training options in men's styling in the past being non-accredited barbering courses or the Certificate III in Hairdressing. A new Certificate III in Barbering has been developed to address the growing demand offering skills in cutting and styling using barbering techniques, facial hair grooming, and wet shaving.

⁵⁹ - <https://www.serviceskills.com.au/sites/default/files/files/Environmental%20Scans/2015-SSA-Escan-WRAPs.pdf>

Figure 71 - Other Services, Employment Share by Post-School Qualification Level



Social media and apps are being used as marketing tools requiring staff to be skilled not only in beauty, but also online content management and complaints handling. The beauty sector has raised concerns about graduates' varying level of proficiency in common treatments and lacking the ability to organise themselves, work efficiently and sell products. The Certificate III in Beauty Services has overtaken the Certificate II in Retail Make-Up and Skin Care as the most popular qualification. This increase could be attributed to South Australia's Skills for All funding program, which saw a 122 percent increase in uptake of the Certificate III in Beauty Services⁶⁰.

In the auto repair and maintenance sector, skills shortages for fully qualified and good quality tradespersons are a concern, stemming from insufficient new entrants, competition from other Industries such as Mining and Construction, and poor quality candidates. Concerns exist around the quality of Apprentices, with employers raising poor Language, Literacy and Numeracy, inability to grasp technical concepts, poor diagnostic skills and poor work ethic as common workplace issues.

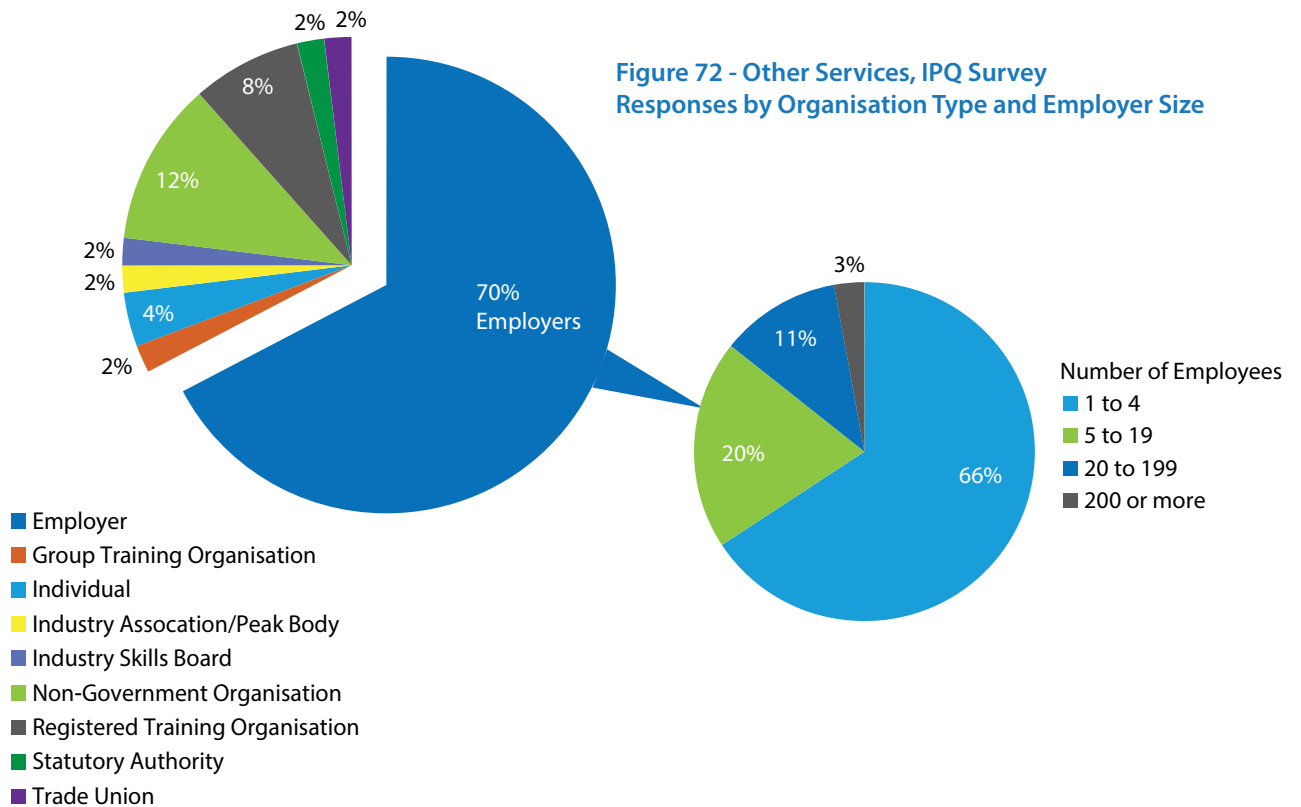
Recommendations to address these included; more effective marketing of the Industry as a viable career option, licensing of automotive trade occupations to enhance standards, and improved quality of trade teachers.⁶¹

⁶⁰ - ABS, 2014, 81650, Counts of Australian Businesses, including Entries and Exits, Jun 2009 to Jun 2013.

⁶¹ - Auto Skills Australia, 2015, Automotive Environmental Escan 2015

Industry Priority Qualifications

The Other Services industry received a total of 50 responses to the Survey. This exceeded the target number of responses for this Industry, with excellent sub-sector distribution.



The vast majority of employers in this Industry sector were small to medium size enterprises. Around two-thirds of employers reported likely additions to staff in the short to medium-term.

Stakeholders made few changes to the raw Survey data, with only a few of the sub-sector critical qualifications moving from Tier 4 to Tier 3 (specifically automotive repair qualifications).

Table 28 - Other Services, Prioritised Qualifications

Other Services

Tier 1 (Highest Priority)

Certificate IV in Small Business Management
 Certificate IV in Work Health and Safety
 Certificate III in Hairdressing
 Certificate III in Work Health and Safety

Tier 2 (High Priority)

Advanced Diploma of Work Health and Safety
 Diploma of Leadership and Management
 Diploma of Work Health and Safety
 Certificate IV in Beauty Therapy
 Certificate IV in Hairdressing
 Certificate IV in Human Resources
 Certificate IV in Leadership and Management
 Certificate IV in Project Management Practice
 Certificate III in Beauty Services
 Certificate III in Business
 Certificate III in Business Administration
 Certificate II in Nail Technology

Tier 3 (Priority)

Advanced Diploma of Business
 Advanced Diploma of Leadership and Management
 Diploma of Beauty Therapy
 Diploma of Salon Management
 Certificate IV in Business
 Certificate IV in Business Administration
 Certificate IV in Mediation
 Certificate III in Accounts Administration
 Certificate III in Agricultural Mechanical Technology
 Certificate III in Automotive Body Repair Technology
 Certificate III in Automotive Diesel Engine Technology
 Certificate III in Automotive Electrical Technology
 Certificate III in Automotive Refinishing Technology
 Certificate III in Light Vehicle Mechanical Technology
 Certificate III in Mobile Plant Technology
 Certificate II in Automotive Electrical Technology
 Certificate II in Automotive Servicing Technology
 Certificate II in Automotive Tyre Servicing Technology
 Certificate II in Business
 Certificate II in Emergency Medical Service First Response
 Certificate II in Hairdressing
 Certificate II in Retail Make-Up and Skin Care

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au





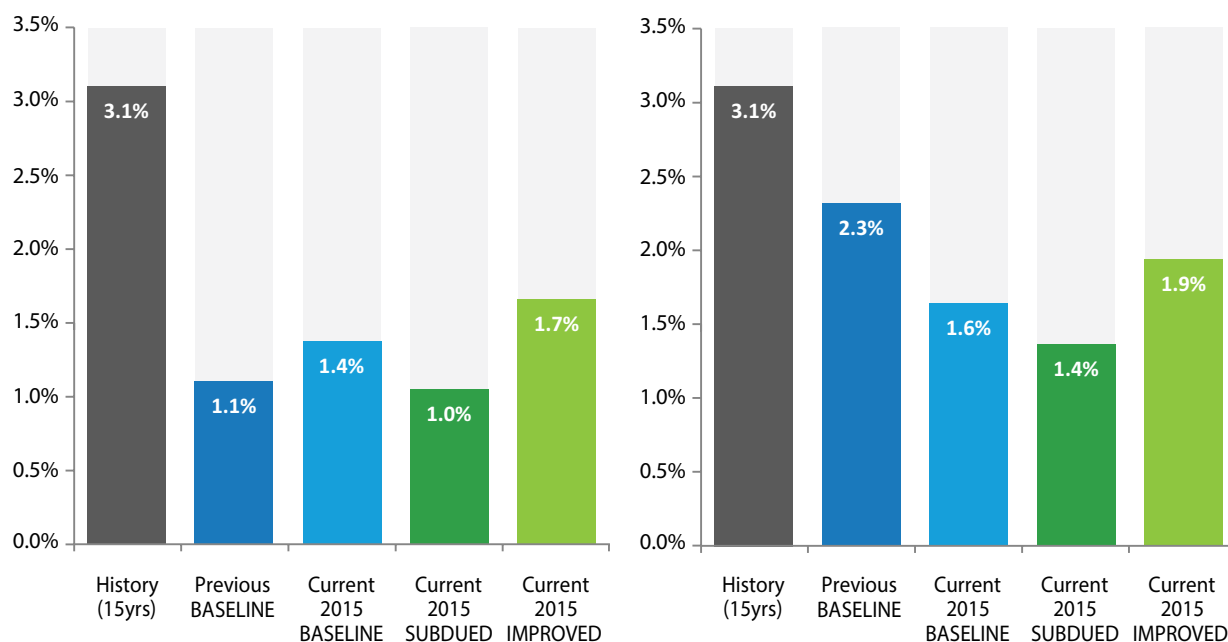
7.14 Professional, Scientific and Technical Services

Employment Outlook

According to the Commission's interim modelling, employment in the Professional, Scientific and Technical Services industry is projected to increase 1.4 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 3.1 percent per annum.

Over the long-term (2014-15 to 2024-25), the industry is expected to record continued employment growth above the State average. As a result, its share of the State's employment is projected to rise from 6.5 percent to 6.9 percent.

Figure 73 - Professional, Scientific & Technical Services, Average Annual Employment Change 2014-15 to 2019-20 and 2014-15 to 2024-25

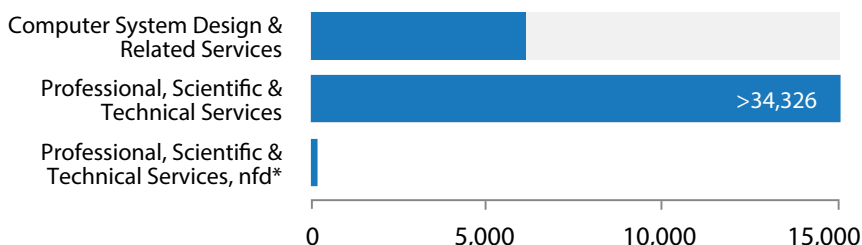


Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

The Professional, Scientific and Technical Services Industry is comprised of nine sectors, including: Scientific Research Services; Architectural, Engineering and Technical Services; Legal and Accounting Services; Advertising Services; Market Research and Statistical Services; Management and Related Consulting Services; Veterinary Services; Other Professional, Scientific and Technical Services; and Computer System Design and Related Services.

Figure 74 - Professional, Scientific & Technical Services, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

The largest of these sectors is the Legal and Accounting Services sector followed by Architectural, Engineering and Technical Services, Computer System Design and Related Services, and Management and Related Consulting Services. The outsourcing of these services has enabled enterprises to lower the cost of ancillary services and better focus on their core activities.

Employment growth has been highest in Western Australia, Victoria and New South Wales, while in South Australia there has been a small retraction in employment. Employment growth predictions vary across the sectors but robust employment growth is projected for Computer Systems Design and related sectors and Legal and Accounting Services⁶².

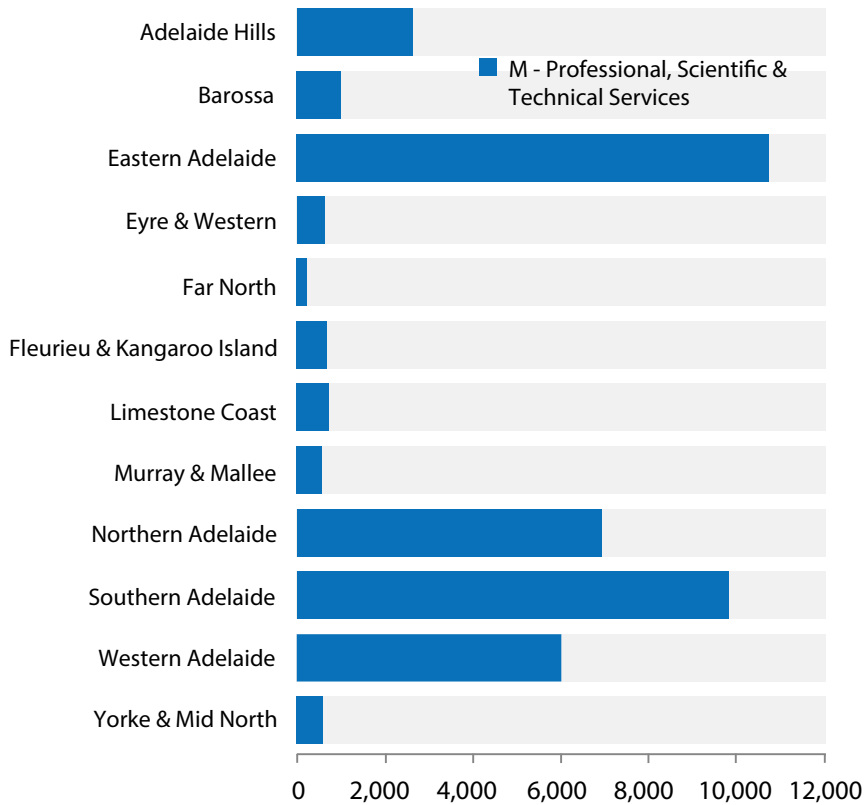
Service providers are responding to trends by forging business partnerships, specialising in niche areas, employing more professionals, distributing decision making more widely, getting closer to customers through data and harnessing the contingent workforce. The Industry in most sectors is largely made up of small businesses employing less than 20 people and many sole proprietors or partnerships. Larger enterprises are purchasing medium size firms resulting in a two-tier industry, comprising a small number of very large, and many very small businesses⁶³.

The major challenge faced by the Professional, Scientific and Technical Services Industry is the reduction in Government funding. The current subdued general business outlook coupled with many projects being cancelled or put on hold is reducing demand in some sectors of the Industry.

62 - Australian Government, 2014, Industry Outlook Professional, Scientific and Technical Services Department of Employment.

63 - <https://www.ibsa.org.au/sites/default/files/media/SAPercent20Environmentpercent20Scanpercent202015percent20Businesspercent20Servicespercent20Industry.pdf>

**Figure 75 - Professional, Scientific & Technical Services,
Employment by Region**



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Skills needs

Survey respondents ranked the Managerial and Leadership skills cluster as having the highest importance, followed by the Sales and Customer Service and then the Administration and Support skills clusters.

Language, Literacy and Numeracy (LLN) and Sustainability and Environmental skills clusters were ranked of lowest importance by the Professional, Scientific and Technical Services Survey respondents.

Table 29 - Professional, Scientific & Technical Services, Ranked Skills Clusters

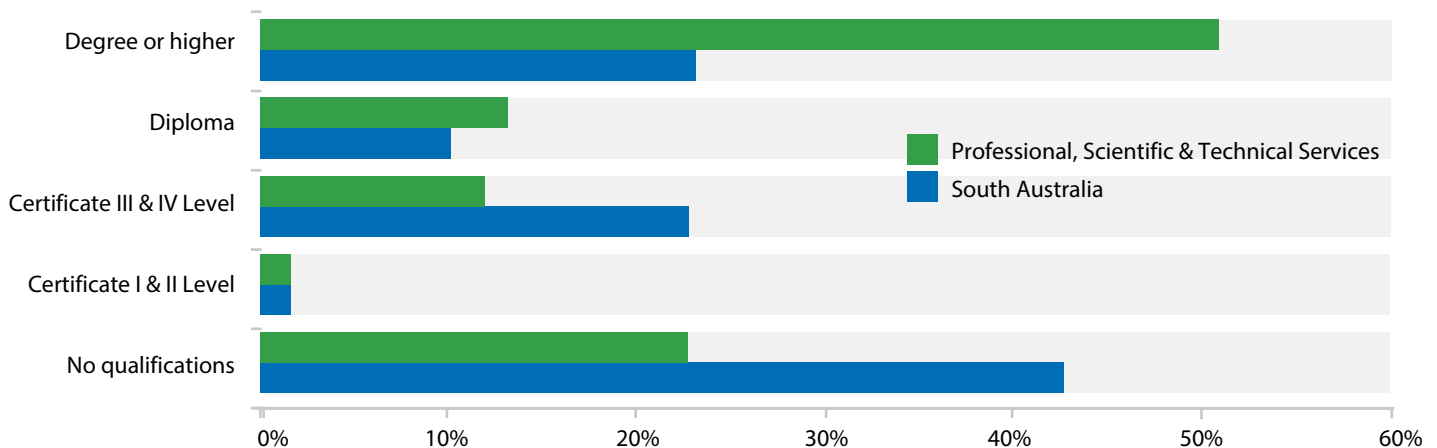
Skills Clusters	This Industry	All Respondents	Compare
Managerial & Leadership	1	1	↔
Sales & Customer Service	2	2	↔
Information & Technology	3	3	↔
Administration & Support	4	5	↑
Entrepreneurial	5	11	↑
Marketing & Engagement	6	7	↑
Human Resources	7	8	↑
Financial	8	6	↓
Work Health & Safety (WHS)	9	4	↓
Sustainability & Environmental	10	9	↓
Language, Literacy & Numeracy (LLN)	11	10	↓

Workforce development themes and issues

Professionals are expected to benefit from an increased share of state employment over the next five (5) years⁶⁴. In addition, jobs in Professional, Scientific and Technical Services are generally much less susceptible to automation as they require higher levels of creative and social intelligence⁶⁵.

More and more jobs are being created at the professional level with businesses increasingly wanting to employ workers with higher level VET and Degree qualifications, reflecting a deepening of skills and knowledge required to perform functions that are unable to be automated. This suggests that higher level qualifications and training will be required in the future and investing in articulation arrangements with higher education providers could provide benefits to all stakeholders as it creates pathways for disadvantaged cohorts.

Figure 76 - Professional, Scientific & Technical Services, Employment Share by Post-School Qualification Level



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

64 - <https://www.ibsa.org.au/sites/default/files/media/IBSApercent20Environmentpercent20Scanpercent202015percent20Businesspercent20Servicespercent20Industry.pdf>

65 - Department of Industry and Science Research Paper, 2015, A rising tide: automation within Australia's labour market, Australian Government

Many roles in this industry require or will require computational thinking skills to make sense of volumes of information. As the language of analytics permeates organisations, and Big Data moves from the realm of data scientists to everyday business transactions, non-technical staff will be required to organise and interpret data and simulate scenarios for planning and decision making.

Recruiters that currently value applicants who are familiar with basic applications, such as the Microsoft Office suite, will shift their expectations to candidates with statistical analysis and quantitative reasoning skills⁶⁶.

In this context, Mathematics, Statistics and Information Technology skills are increasingly important. People will need these supporting core skills that are essential dimensions of computational thinking, including:

- confidence in dealing with complexity
- persistence in working with difficult problems
- tolerance for ambiguity
- the ability to deal with open ended problems; and
- the ability to communicate and work with others to achieve a common goal or solution⁶⁷.

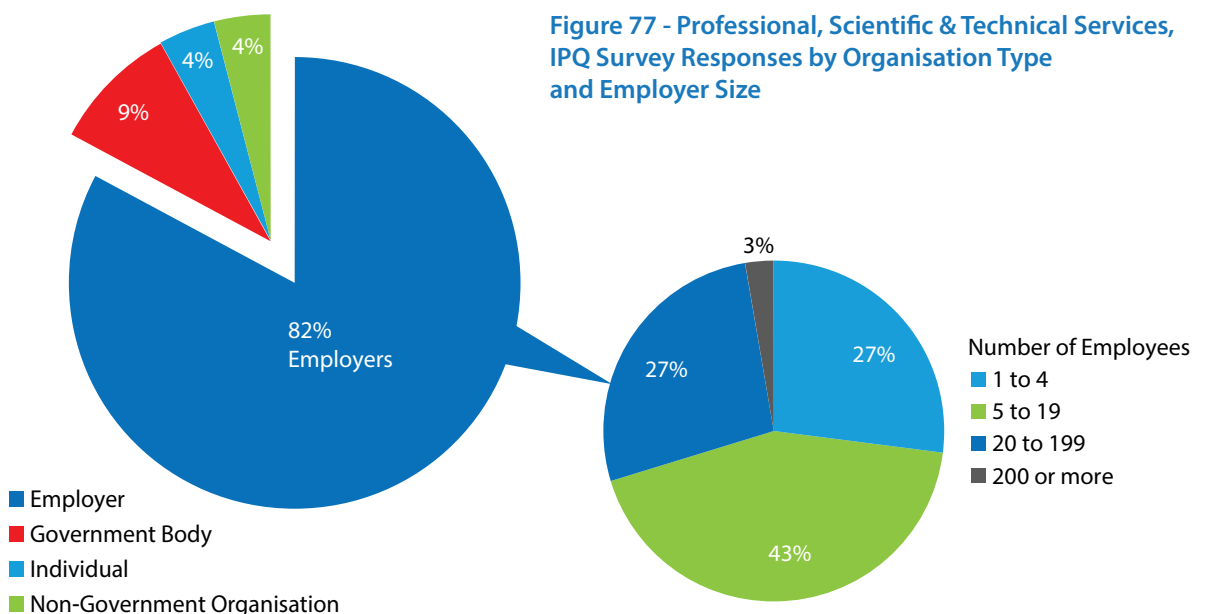


⁶⁶ - <https://www.ibsa.org.au/sites/default/files/media/IBSApercent20Environmentpercent20Scanpercent202015percent20Businesspercent20Servicespercent20Industry.pdf>

⁶⁷ - <https://www.ibsa.org.au/sites/default/files/media/IBSApercent20Environmentpercent20Scanpercent202015percent20Businesspercent20Servicespercent20Industry.pdf>

Industry Priority Qualifications

The Professional, Scientific and Technical Services Industry received a total of 45 responses to the Survey. The number of responses was commensurate with the employment share for this Industry and the sub-sector distribution shows good representation for each sub-sector. Respondents in this Industry primarily identified as employers.



Over two-thirds of employers in this industry were small or medium businesses. Few employers identified as large businesses. Half of the employers expected employment growth in the short-term.

Stakeholders had some difficulty interpreting the results of the Survey, given the very diverse nature of the key sector occupations. In general, Engineering qualifications performed very well in the raw data, but several key occupations had very few qualifications. A number of moderations were required to ensure critical qualifications were represented in the appropriate Tiers.

Table 30 - Professional, Scientific & Technical Services, Prioritised Qualifications

Professional, Scientific & Technical Services

Tier 1 (Highest Priority)	Tier 3 (Priority)
<p>Certificate IV in Information Technology Networking Certificate IV in Leadership and Management Certificate IV in Small Business Management Certificate III in Engineering - Mechanical Trade Certificate III in Information, Digital Media & Technology Certificate II in Engineering - Production Technology</p>	<p>Advanced Diploma of Marketing Diploma of Building Design Diploma of Business Diploma of Engineering - Advanced Trade Diploma of Engineering Drafting (Accredited Course) Diploma of Graphic Design Diploma of Human Resources Management Diploma of Information Technology Systems Administration Diploma of Project Management Diploma of Veterinary Nursing (Emergency and Critical Care) Diploma of Work Health and Safety Certificate IV in Advertising Certificate IV in Business Sales Certificate IV in Companion Animal Services Certificate IV in Human Resources Certificate IV in Legal Services Certificate IV in Marketing Certificate IV in Project Management Practice Certificate III in Business Administration Certificate III in Customer Engagement Certificate III in Engineering - Production Systems Certificate III in Engineering - Technical Certificate III in Surveying and Spatial Information Services Certificate II in Emergency Medical Service First Response Certificate II in Information, Digital Media and Technology</p>
Tier 2 (High Priority)	
<p>Advanced Diploma of Business Advanced Diploma of Engineering Advanced Diploma of Leadership & Management Diploma of Business Administration Diploma of Leadership and Management Diploma of Marketing Certificate IV in Computer Systems Technology Certificate IV in Engineering Certificate IV in Information Technology Certificate IV in Information Technology Support Certificate IV in Veterinary Nursing Certificate IV in Work Health and Safety Certificate III in Work Health and Safety Certificate II in Engineering Certificate I in Engineering</p>	

A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au



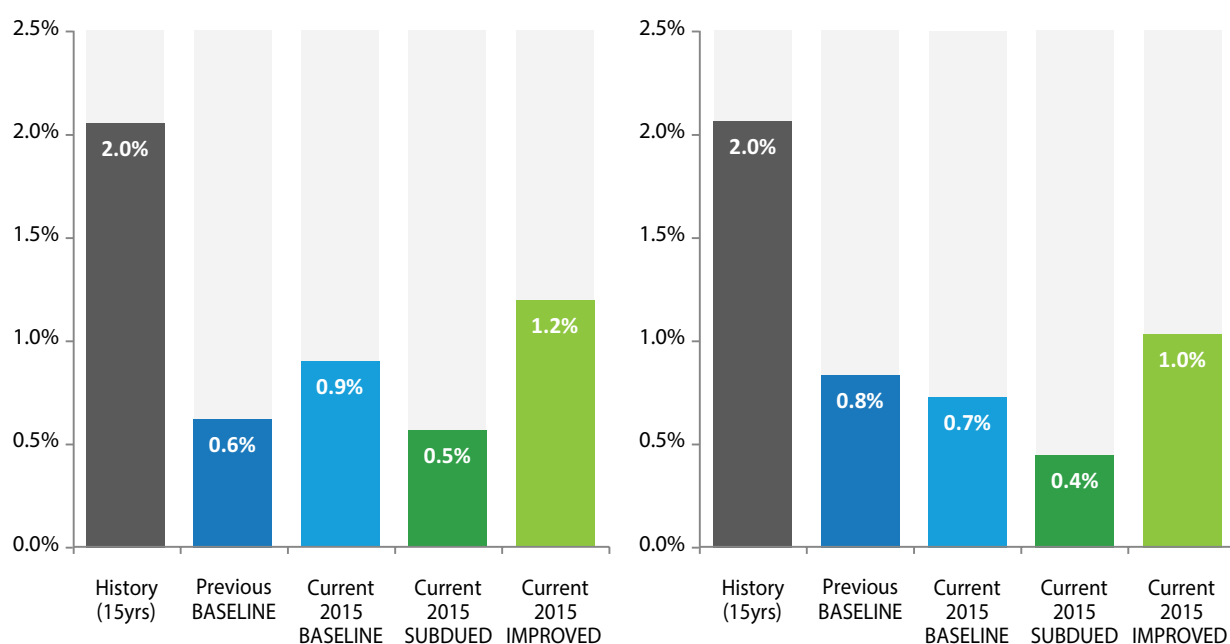
7.15 Public Administration and Safety

Employment Outlook

According to the Commission's interim modelling, employment in the Public Administration and Safety Industry is projected to increase 0.9 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 2 percent per annum.

Over the long-term (2014-15 to 2024-25), the Industry is expected to record continued employment growth below the State average. As a result, its share of the State's employment is projected to decline from 6.0 percent to 5.8 percent.

**Figure 78 - Public Administration & Safety, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

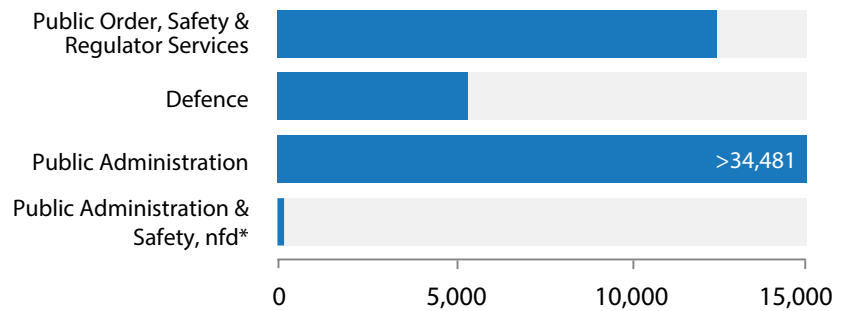
Industry Outlook

In the year to August 2015, there were 51,700 people employed in the Public Administration and Safety industry in South Australia. The majority of workers are female and work full-time and the share of females has increased recently. The most popular occupation is Clerical and Administrative Workers followed by Community and Personal Service Workers; both of these occupations are more traditionally associated with female workers.

This industry is more qualified than the South Australian workforce with 68.6 percent having a Certificate III or higher, compared to the South Australian workforce with 55.5 percent. Since 2009, enrolments in VET courses related to the Public Administration and Safety Industry have increased by 2,808 (or 44.8 percent) to 9,082 students.⁶⁸

The South Australian public sector head count has varied insignificantly since 2010, though executives as a percent of the total head count has declined marginally.

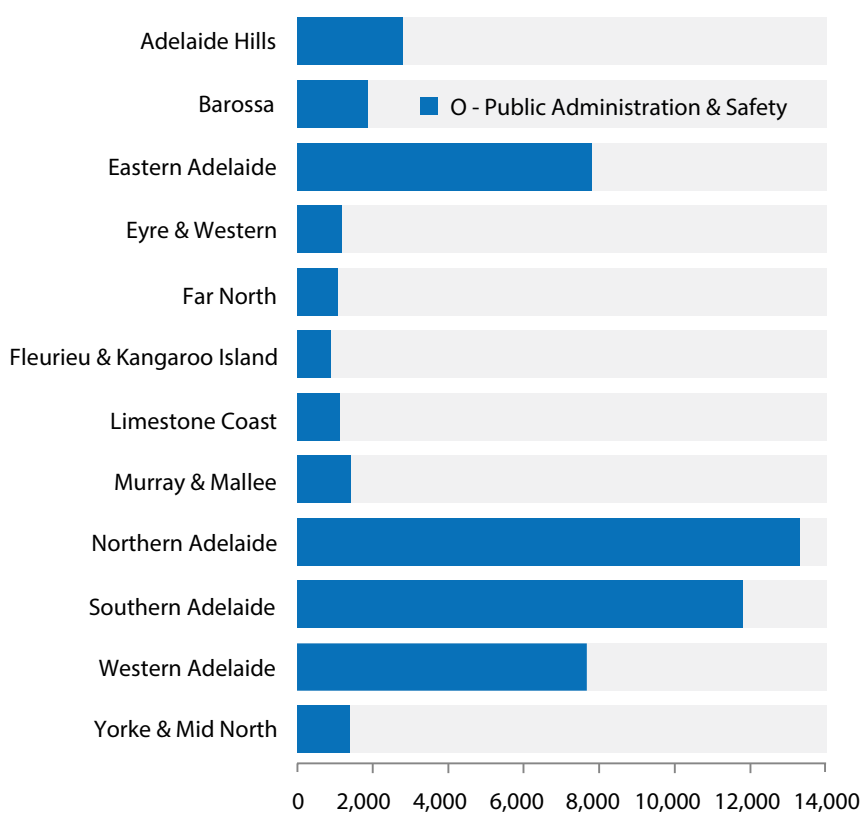
Figure 79 - Public Administration & Safety, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

⁶⁸ - <http://workforcewizard.skills.sa.gov.au/ReportResult.aspx>

Figure 80 - Public Administration & Safety, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Skills needs

Survey respondents ranked the Managerial and Leadership skills cluster as having the highest importance, followed by the Work Health and Safety (WHS) and then the Administration and Support skills clusters. The ranking of WHS is consistent with the risk associated with some sectors within this industry, including corrections, emergency services and defence.

Entrepreneurial and Language, Literacy and Numeracy (LLN) skills clusters were ranked of lowest importance by the Public Administration and Safety Survey respondents.

Table 31 - Public Administration & Safety, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Managerial & Leadership	1	1	↔
Work Health & Safety (WHS)	2	4	↑
Administration & Support	3	5	↑
Information & Technology	4	3	↓
Human Resources	5	8	↑
Financial	6	6	↔
Sustainability & Environmental	7	9	↑
Sales & Customer Service	8	2	↓
Marketing & Engagement	9	7	↓
Language, Literacy & Numeracy (LLN)	10	10	↔
Entrepreneurial	11	11	↔

Workforce development themes and issues

There were 523 Apprentices and Trainees undertaking publicly subsidised training in Correctional Services, Local Government, Public Safety, Public Sector and Water Training Packages at the year ending 30 June 2014 in South Australia. This represents 19.5 percent of all Australian Apprentices and Trainees in these Training Packages.

The ageing workforce in Local Government in South Australia is illustrated by the percentage of workers aged over 55 years rising from 22.9 percent in 2013 to 25 percent in 2015⁶⁹. A Survey conducted by the Australian Centre of Excellence for Local Government (ACELG) Survey found Local Government in South Australia reported having an established workforce plan, and 58.3 percent have either substantially completed or commenced a workforce plan.

The foremost workforce planning challenge for Local Governments is the ageing workforce and the high levels of impending retirements. Other issues relating to the ageing workforce included knowledge management and transfer, difficulties in attracting younger workers to council, and the investment required in new equipment due to the decreasing physical capacity of the workforce. Challenges relating to skills shortages, recruitment competition, and competition with city councils are also key workforce concerns.

Identified workforce development challenges relating to human resource management included a lack of workforce planning resources, staff retention, leadership development, and succession planning.⁷⁰

Limited training budgets and the cost of accessing training remain important issues for local governments.

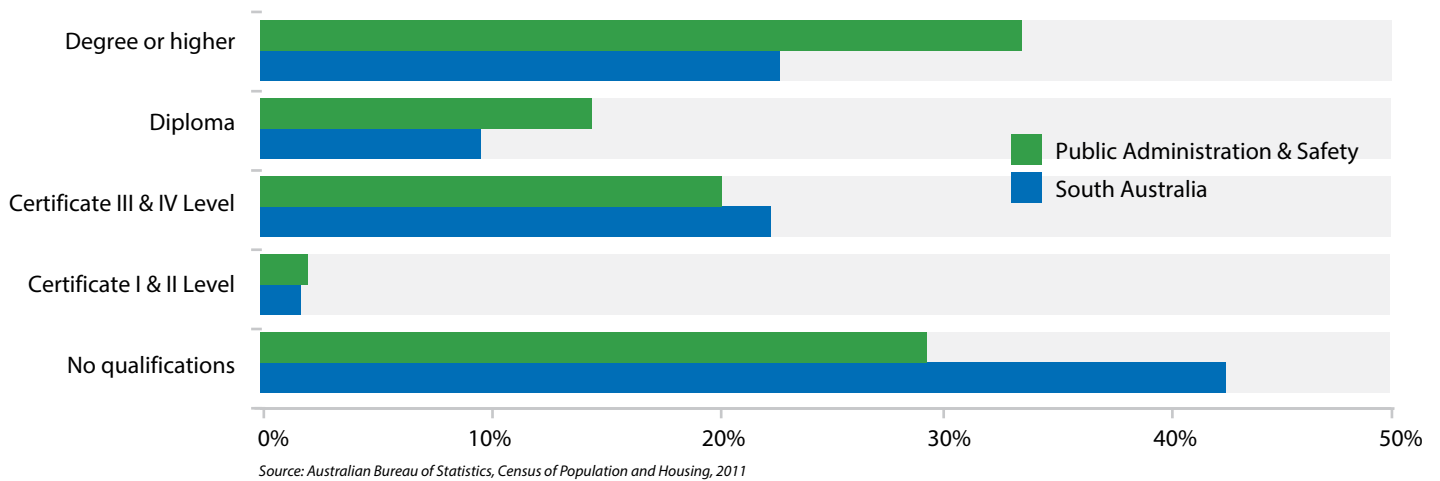
Vacancies are reported in the following occupations: Engineering, Design, Surveying, Drafting and Childcare. By quantifying the extent of skills shortages in Local Government, the sector may be able to attract funding to provide more training in these occupations.

The South Australian public sector has a number of workforce strategies and targets aimed at increasing workforce diversity, including; aboriginal employment, people with a disability, women in executive positions, and women on, and chairing, State Government Boards and Committees. Progress is positive but in the main still lags targets set in the South Australian Strategic Plan⁷¹.

69 - http://governmentskills.com.au/usercontent/documents/Escans/Escan_2015_book_04DD.pdf
70 - ACLEG, 2015, *Profile of the Local Government Workforce*.

71 - <http://publicsector.sa.gov.au/about/our-public-sector/state-of-the-sector/>

Figure 81 - Public Administration & Safety, Employment Share by Post-School Qualification Level



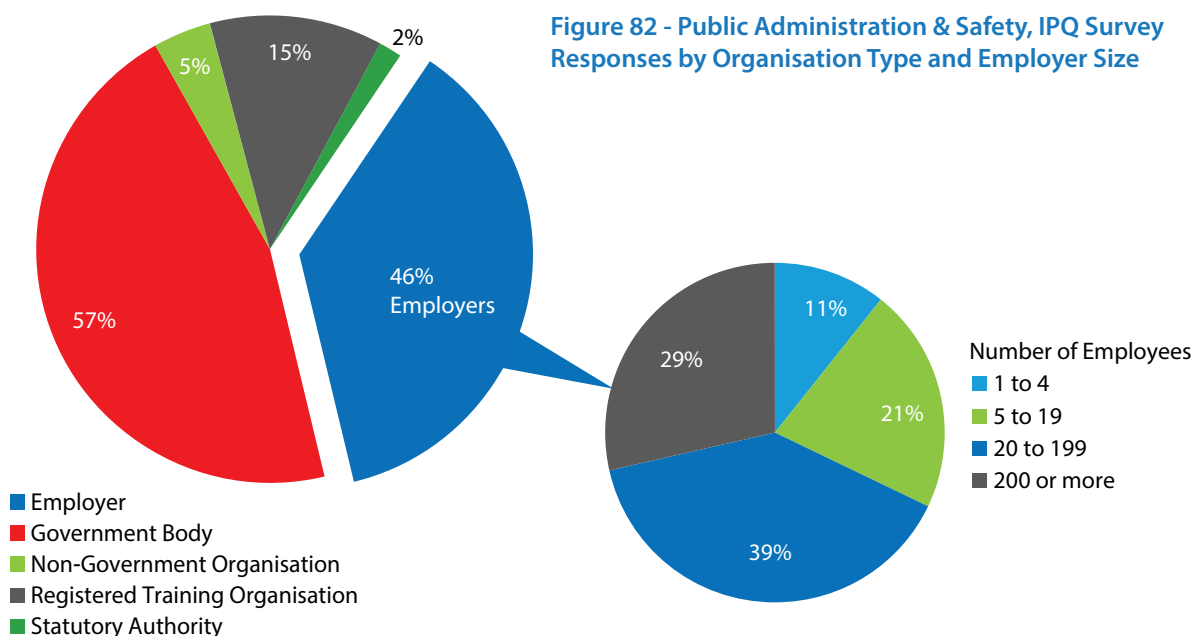
Cross sectoral workforce issues include:

- ageing for all sectors and the associated loss of knowledge and skills, and management of an ageing workforce
- financial constraints and the loss of Commonwealth Government funded programs such as the National Workforce Development Fund and the Workplace English Language and Literary program (WELL), which were often used with those facing disadvantage
- growth in demand areas particularly for community-focused services and away from 'rates, roads and rubbish'
- legislation and regulations changes
- increased scope of duties and the need for more generalist rather than technical specialists; and
- attracting and retaining staff⁷².

⁷² - http://governmentskills.com.au/usercontent/documents/Escans/Escaan_2015_book_04DD.pdf

Industry Priority Qualifications

The Public Administration and Safety Industry received a total of 61 responses. This exceeded the target number of responses, with the distribution among sub-sectors and organisation types broadly satisfactory. The Public Order, Safety and Regulatory Services sub-sector is slightly overrepresented. The share of responses from Government Bodies is understandably high for this Industry.



The majority of employers in this Industry were medium or large enterprises, and more than half projected flat or declining employee growth.

Discussions among stakeholders centred on ensuring the critical qualifications in this industry were represented in the top Tiers. Overall, very few changes were made. A small number of qualifications were shifted from Tier 4 to Tier 3, and the number of qualifications Tier 1 were trimmed slightly.

Table 32 - Public Administration & Safety, Prioritised Qualifications

Public Administration and Safety

Tier 1 (Highest Priority)

Diploma of Human Resources Management
 Certificate IV in Local Government
 (Regulatory Services)
 Certificate IV in Work Health and Safety
 Certificate III in Local Government
 (Regulatory Services)

Tier 2 (High Priority)

Diploma of Leadership and Management
 Diploma of Project Management
 Diploma of Work Health and Safety
 Certificate IV in Human Resources
 Certificate IV in Leadership and Management
 Certificate IV in Local Government
 Certificate IV in Purchasing
 Certificate III in Business Administration
 Certificate III in Recordkeeping
 Certificate II in Security Operations

Tier 3 (Priority)

Advanced Diploma of Accounting
 Advanced Diploma of Leadership & Management
 Advanced Diploma of Program Management
 Advanced Diploma of Work Health and Safety
 Diploma of Accounting
 Diploma of Business Administration
 Diploma of Purchasing
 Certificate IV in Accounting
 Certificate IV in Correctional Practice
 Certificate IV in Local Government
 (Operational Works)
 Certificate IV in Local Government Administration
 Certificate IV in Project Management Practice
 Certificate III in Business
 Certificate III in Correctional Practice
 Certificate III in Information, Digital Media and
 Technology
 Certificate III in Local Government
 Certificate III in Police Studies (Accredited Course)
 Certificate III in Security Operations
 Certificate III in Work Health and Safety
 Certificate II in Emergency Medical Service First
 Response
 Certificate II in Local Government
 Certificate II in Public Safety (Firefighting and
 Emergency Operations)

A full list of **Tier 4 (Low Priority)** Industry Prioritised
 Qualifications are available in the IPQ Dataset

www.tasc.sa.gov.au





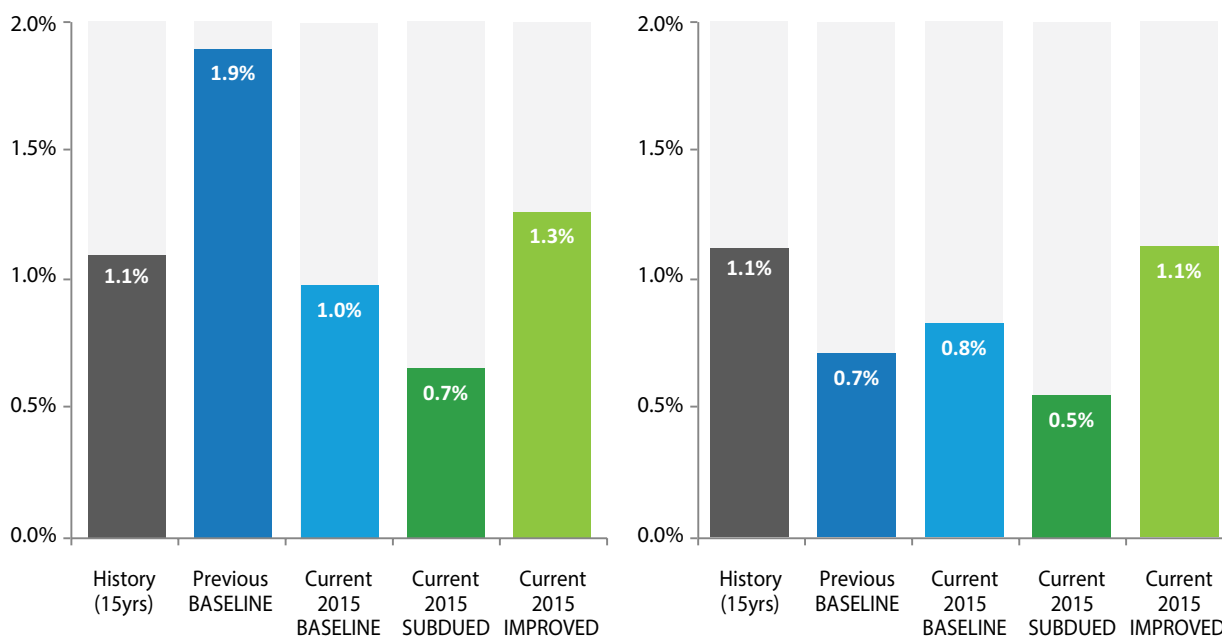
7.16 Rental, Hiring and Real Estate Services

Employment Outlook

According to the Commission's interim modelling, employment in the Rental, Hiring and Real Estate Services industry is projected to increase 1.0 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 1.1 percent per annum.

Over the long-term (2014-15 to 2024-25), the Industry is expected to record continued employment growth slightly below the State average. As a result, its share of the State's employment is projected to decline from 1.4 percent to 1.3 percent.

Figure 83 - Rental, Hiring & Real Estate Services, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25



Source: Interim TaSC Economic Modelling, 2015

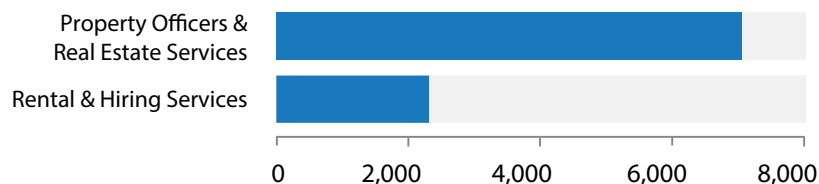
Industry Outlook

The Rental, Hiring and Real Estate Services Industry includes units mainly engaged in renting, hiring, or otherwise allowing the use of tangible or intangible assets (except copyrights), and units providing related services. The major portion of this sector comprises units that rent, hire, or otherwise allow the use of their own assets by others. The assets may be tangible, as in the case of real estate and equipment, or intangible, as in the case with patents and trademarks.

The sector also includes units engaged in providing real estate services such as selling, renting and buying real estate for others, managing real estate for others and appraising real estate.

In South Australia, residential vacancy rates rose between June 2014 and June 2015, from 1.6 percent to 1.9 percent⁷³. Office space vacancies are rising, with calls to migrate ageing commercial stock into prime residential redevelopments. The slowing construction pipeline over the next two years is an important driver of balance in the Adelaide leasing market, following the strong recent period of supply.

Figure 84 - Rental, Hiring & Real Estate Services, Employment by Sub-Sector

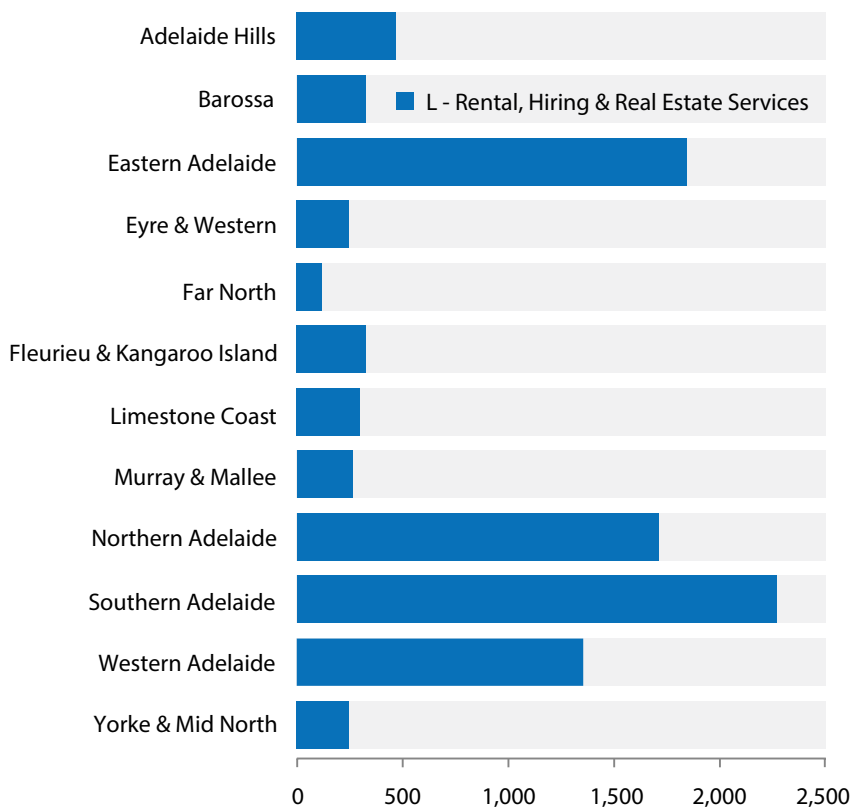


Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

In the year to August 2015, there were 10,100 people employed in the Rental, Hiring and Real Estate Services Industry and this number has declined since 2010 by 17.9 percent. Males dominate the industry (58.4 percent) and in recent years the share of males has increased. The majority of the workforce is employed full-time and from 2010 to 2015 the share of full-time employment has increased from 71.5 percent to 75.2 percent. In 2014, there were 1,131 students in VET courses related to the Rental, Hiring & Real Estate Services Industry.

⁷³ - <http://propertyupdate.com.au/latest-vacancy-rates-around-australia/>

Figure 85 - Rental, Hiring & Real Estate Services, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Skills needs

Survey respondents ranked the Sales and Customer Service skills cluster as having the highest importance, followed by the Administration and Support and then the Marketing and Engagement skills clusters.

Entrepreneurial and Sustainability and Environmental skills clusters were ranked of lowest importance by the Rental, Hiring and Real Estate Services Survey respondents.

Table 33 - Rental, Hiring & Real Estate Services, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Sales & Customer Service	1	2	↑
Administration & Support	2	5	↑
Marketing & Engagement	3	7	↑
Managerial & Leadership	4	1	↓
Information & Technology	5	3	↓
Financial	6	6	↔
Work Health & Safety (WHS)	7	4	↓
Language, Literacy & Numeracy (LLN)	8	10	↑
Human Resources	9	8	↓
Sustainability & Environmental	10	9	↓
Entrepreneurial	11	11	↔

Workforce development themes and issues

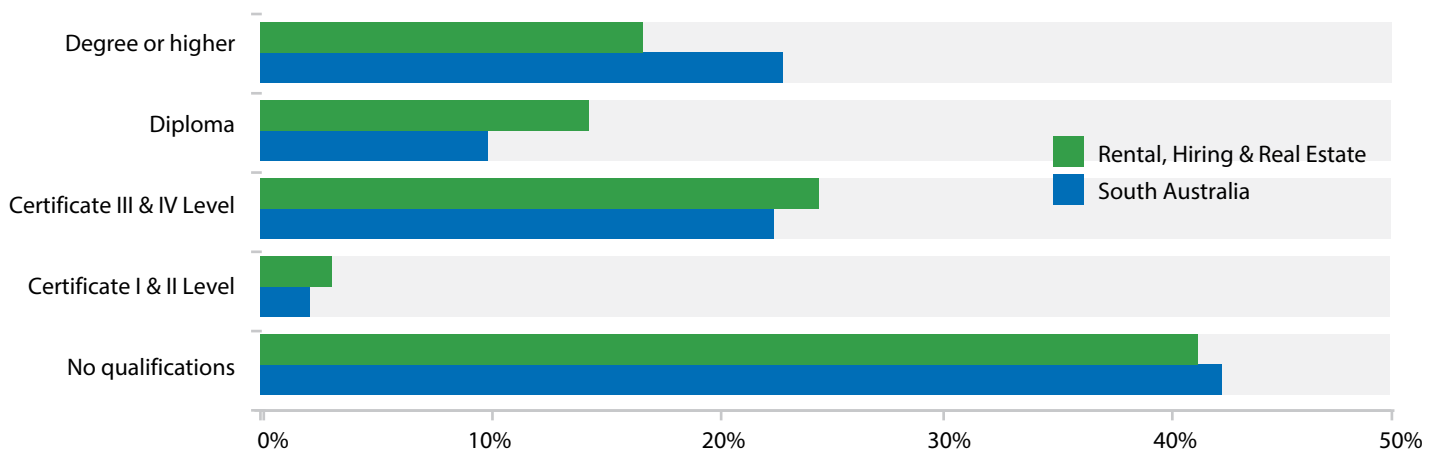
As employment opportunities in the property services industries have a flow on effect from changes in the economy and the impact on construction activity, a strong rise in building approvals and historically low interest rates are also likely to support growth.

Technology is changing the way people rent, buy and sell real estate. Mobile tools like smartphones, tablets and other handheld devices help agents and consumer's access information anytime and anywhere. Tools for collaboration and sharing information quickly allow for faster and simpler transactions between the real estate agent, buyers and sellers and intermediaries like banks and conveyancers and impact on skill requirements. The trend for total asset maintenance and bundling of services continues with the use of remote technology providing cost effective solutions.

Digital literacy and customer service skills are critical skills in this Industry. Mentoring of new entrants by experienced workers may become more challenging as the ageing workforce approaches retirement. New work models that support more part-time work may increase workplace diversity and allow mature workers to work longer and mentor new entrants.

For an industry that is largely transaction based, the risks of automation reducing workforce numbers is high.

Figure 86 - Rental, Hiring & Real Estate Services, Employment Share by Post-School Qualification Level



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Industry Priority Qualifications

The Rental, Hiring & Real Estates Services Industry received a total of 29 responses to the Survey. This was one of several industries that received far more responses than the targeted number. The distribution among sub-sectors was excellent. This Industry was unique in that all responses came from employers.

Almost three-quarters of employers in this industry were micro or small businesses. Over 60 percent of employers reported likely additions to staff in the short to medium-term.

Stakeholders were pleased with the raw results of the Survey, with only one qualification reprioritised.

Figure 87 - Rental, Hiring & Real Estate Services, IPQ Survey Responses by Organisation Type and Employer Size

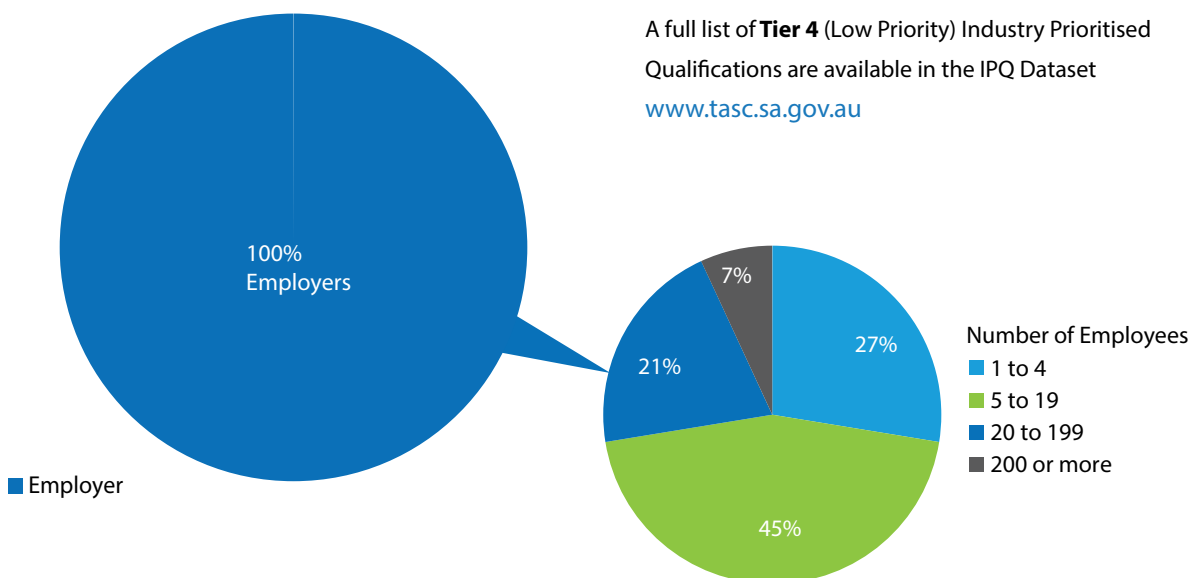


Table 34 - Rental, Hiring & Real Estate Services, Prioritised Qualifications

Rental, Hiring and Real Estate Services

Tier 1 (Highest Priority)

Diploma of Property Services (Agency Management)
Certificate IV in Property Services (Real Estate)
Certificate III in Property Services (Agency)

Tier 2 (High Priority)

Diploma of Financial Services
Certificate IV in Business Sales
Certificate IV in Marketing
Certificate III in Business Administration
Certificate II in Business

Tier 3 (Priority)

Advanced Diploma of Accounting
Advanced Diploma of Marketing
Diploma of Accounting
Diploma of Marketing
Certificate IV in Accounting
Certificate IV in Business
Certificate IV in Financial Services
Certificate III in Accounts Administration
Certificate III in Business
Certificate III in Customer Engagement
Certificate III in Financial Services
Certificate III in Information, Digital Media and Technology
Certificate III in Recordkeeping
Certificate III in Work Health and Safety
Certificate II in Applied Language
Certificate II in Customer Engagement
Certificate II in Financial Services

A full list of **Tier 4 (Low Priority)** Industry Prioritised Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au

A white wooden post with a horizontal crossbar holds a red rectangular sign with a white border. The sign features the words "FOR RENT" in a large, white, serif font. The background is a blurred image of a two-story house with white siding and dark shutters, set against a blue sky with white clouds. A concrete sidewalk and green bushes are visible in the foreground.

FOR
RENT



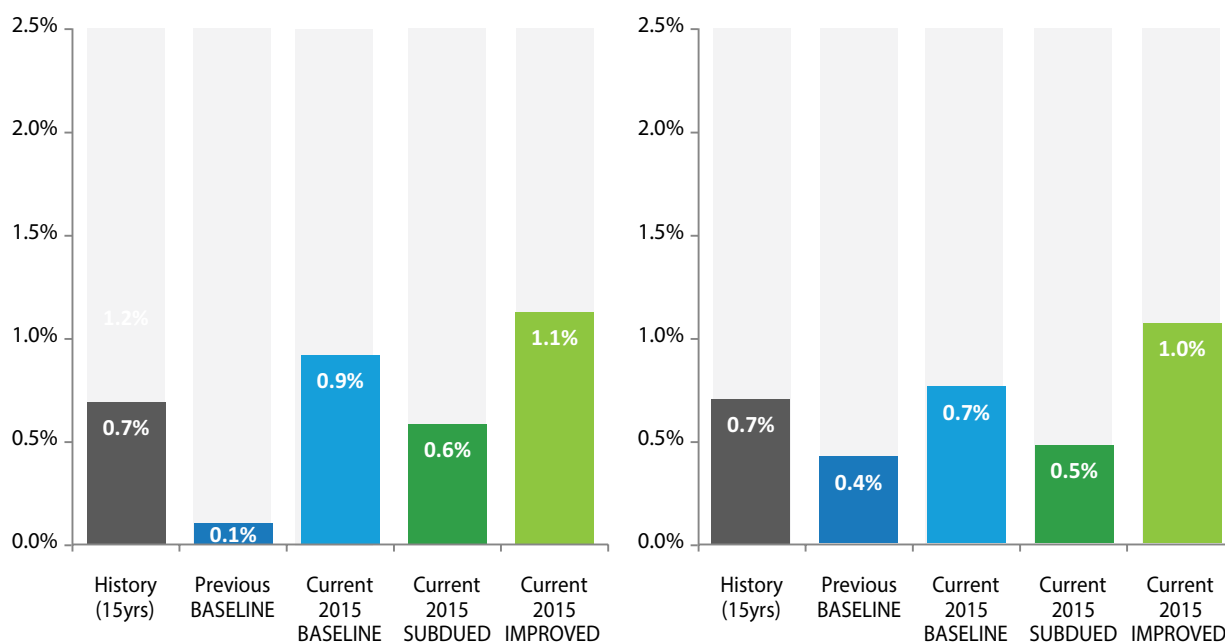
7.17 Retail and Wholesale Trade

Employment Outlook

According to the Commission's interim modelling, employment in the Retail and Wholesale Trade Industry is projected to increase 1.1 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 0.7 percent per annum.

Over the long-term (2014-15 to 2024-25), the Industry is expected to record continued employment growth slightly below the State average. As a result, its share of the State's employment is projected to decline from 13.6 percent to 13.2 percent.

**Figure 88 - Retail & Wholesale Trade, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

Industry Outlook

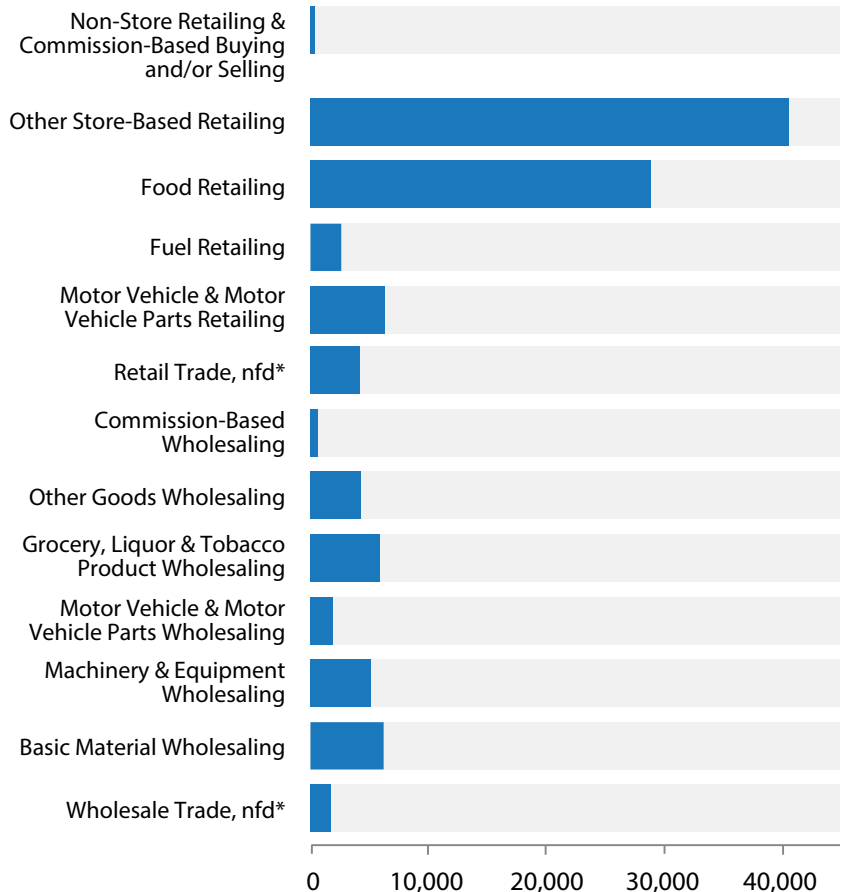
Retail sales rose 6.1 percent in the year to June 2015 in South Australia. The pace of annual growth in retail sales has lifted and is now well above the rate of a year ago (2.8 percent in the year to June 2014). The annual growth rate also remains well above the 10-year average of 3.6 percent.⁷⁴ This solid growth is promising for an Industry strongly affected by interest rates, online buying, changing customer expectations and increasing competition from International retailers.

Efficient merchandise and supply chain management are critical to successful online customer service with technology, such as Radio Frequency Identification (RFID) replacing bar coding and providing instantaneous stock information.

Traditional one-way marketing has been well and truly replaced by social media, underpinned by Big Data making use of loyalty schemes⁷⁵.

Employment in the Wholesale Industry declined in the five years up to November 2014 by 33.2 percent⁷⁶. Traditional wholesale businesses are generally family owned and have an ageing workforce who is looking to retire. This may provide business and employment opportunities in the future.

Figure 89 - Retail & Wholesale Trade, Employment by Sub-Sector



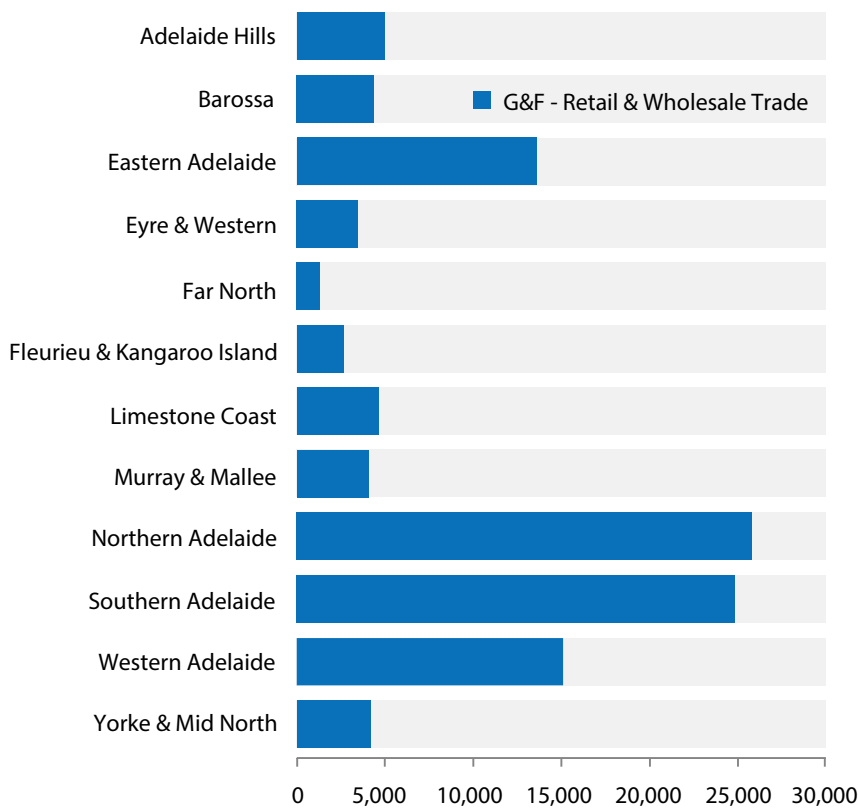
Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

⁷⁴ - <https://www.banksa.com.au/content/dam/bsa/downloads/report-centre/eco-reports/SApercent20Economicpercent20Outlookpercent20Augustpercent202015percent20percent20BSA.pdf>

⁷⁵ - <https://www.serviceskills.com.au/sites/default/files/files/Environmentalpercent20Scans/Snapshots/2015-Retail-and-Wholesale-Snapshot.pdf>

⁷⁶ - Department of Employment, 2015, Australian Jobs 2015, Australian Government.

Figure 90 - Retail & Wholesale Trade, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Motor vehicle and parts wholesaling and retailing, truck wholesaling and retailing, bicycle and marine retailing are expected to grow. Trends in the sector include consolidation of businesses, which is leading to the decline of independent operators. New business models are emerging including the establishment of joint ventures, duopoly arrangements such as those between vehicle auction and salvage auction sub-sectors, and franchisee/franchisor arrangements⁷⁷.



⁷⁷ - Auto Skills Australia, 2015, *Automotive Environmental Escan 2015*

Skills needs

Survey respondents ranked the Sales and Customer Service skills cluster as having the highest importance, followed by the Managerial and Leadership and then the Work Health and Safety (WHS) skills clusters.

Sustainability and Environmental and Language, Literacy and Numeracy (LLN) skills clusters were ranked of lowest importance by the Retail and Wholesale Trade Survey respondents. The subsector distribution was reasonable, despite not reaching the target number of responses. The ranking of the Entrepreneurial cluster skills as third to lowest was surprising given the fierce competition locally, nationally and globally in this Industry.

Workforce development themes and issues

Frontline retail staff are needing advanced problem solving, and deeper product knowledge to build and differentiate the customer experience. Demand for additional retail managers is expected to grow and they will need a broader skill base to manage staff, stock, marketing and information.

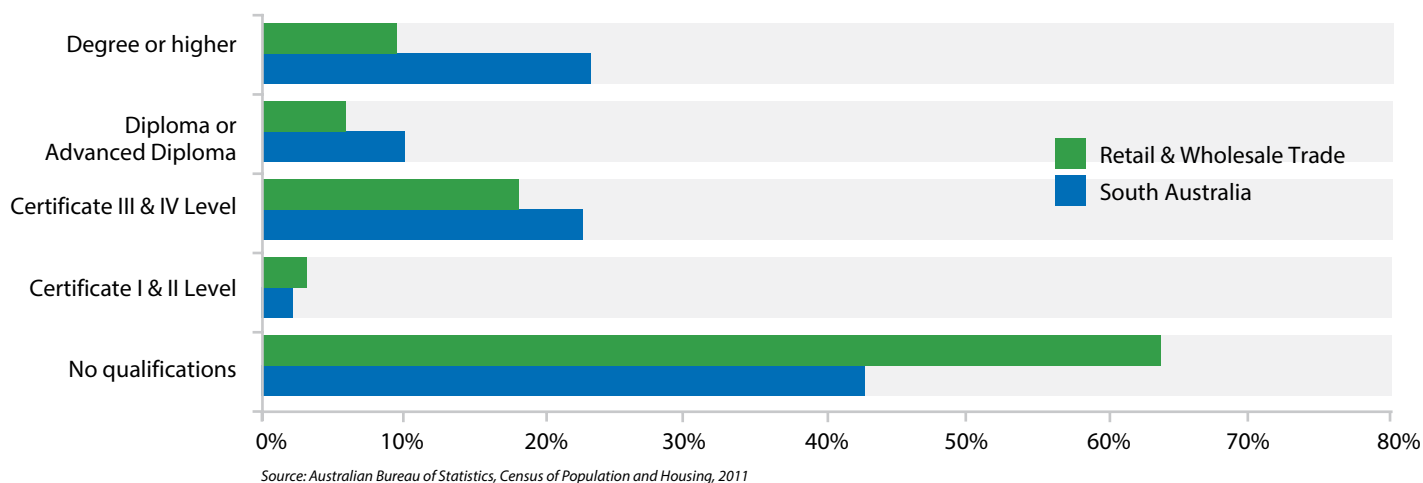
The pace of technological change is increasing demand for business analysis skills. Specifically, the ability to analyse Big Data to make more effective decisions. Additionally, e-commerce, digital literacy and social media skills are expected of the workforce to maintain Websites and social media. Merchandise management, particularly buying and planning skills are in short supply, somewhat explained by the shortage of formal qualifications and in-house development pathways.⁷⁸

Table 35 - Retail & Wholesale Trade, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Sales & Customer Service	1	2	↑
Managerial & Leadership	2	1	↓
Work Health & Safety (WHS)	3	4	↑
Marketing & Engagement	4	7	↑
Administration & Support	5	5	↔
Information & Technology	6	3	↓
Financial	7	6	↓
Human Resources	8	8	↔
Entrepreneurial	9	11	↑
Language, Literacy & Numeracy (LLN)	10	10	↔
Sustainability & Environmental	11	9	↓

⁷⁸ - <https://www.serviceskills.com.au/sites/default/files/files/Environmentalpercent20Scans/2015-SSA-Escan-WRAPs.pdf>

Figure 91 - Retail & Wholesale Trade, Employment Share by Post-School Qualification Level



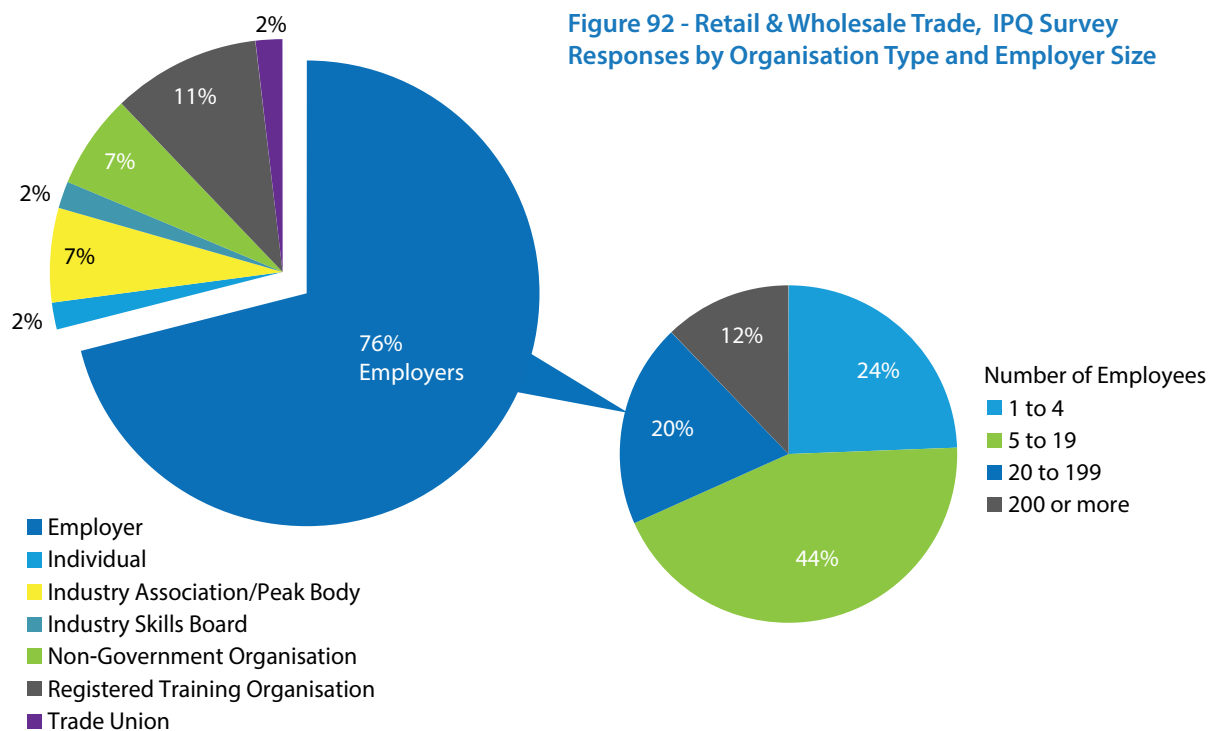
Digital technology offers the Wholesale Industry the same opportunities as Retail but many businesses still don't have websites, and more generally lack the digital skills to utilise the technology available to them. Business-to-business commerce, which requires investing in skills development and hiring new staff, lags well behind business-to-consumer commerce.⁷⁹

The increasing complexity of motor vehicles with intelligent transport systems, navigation, tracking and infotainment systems and the embedded network of controls that manage these technologies are constantly placing new demands on the skills base. The rate of change makes reskilling a constant priority and a challenge. The previous divide between the skills of mechanic technicians and electrical technicians is no longer the case, with basic cross-over skills becoming more desirable. The marine sector reports a decline in Apprentices associated with a lack of career visibility⁸⁰.

⁷⁹ - <https://www.serviceskills.com.au/sites/default/files/files/Environmentalpercent20Scans/2015-SSA-Escan-WRAPs.pdf>
⁸⁰ - Auto Skills Australia, 2015, Automotive Environmental Escan 2015

Industry Priority Qualifications

The Retail and Wholesale Trade industry received a total of 55 responses to the Survey. This was below the target number of responses, however the distribution among sub-sectors and organisation types was satisfactory and peak body industry representation was excellent.



There was a good spread of organisations by size, with the majority in the small to medium size category. Most employers reported flat employment growth over the short-term.

Stakeholders were generally pleased with the raw results of the Survey, with only a few qualifications critical to smaller industry sub-sectors reprioritised.

Table 36 - Retail & Wholesale Trade, Prioritised Qualifications

Retail and Wholesale Trade

Tier 1 (Highest Priority)

Diploma of Retail Management
Certificate IV in Retail Management
Certificate III in Retail Operations
Certificate III in Retail Supervision
Certificate II in Retail Services

Tier 2 (High Priority)

Diploma of Business Administration
Diploma of Leadership and Management
Diploma of Visual Merchandising
Certificate IV in Business
Certificate IV in Business Administration
Certificate IV in Business Sales
Certificate IV in Leadership and Management
Certificate IV in Small Business Management
Certificate IV in Work Health and Safety
Certificate III in Business
Certificate III in Business Administration
Certificate III in Community Pharmacy
Certificate III in Work Health and Safety
Certificate I in Retail Services

Tier 3 (Priority)

Advanced Diploma of Business
Advanced Diploma of Leadership & Management
Advanced Diploma of Marketing
Diploma of Business
Diploma of Financial Services
Diploma of Human Resources Management
Diploma of Purchasing
Diploma of Work Health and Safety
Certificate IV in Accounting
Certificate IV in Bookkeeping
Certificate IV in Community Pharmacy
Certificate IV in Customer Engagement
Certificate IV in Financial Services
Certificate IV in Human Resources
Certificate IV in Marketing
Certificate IV in Project Management Practice
Certificate IV in Purchasing
Certificate II in Information, Digital Media and Technology
Certificate III in Automotive Sales
Certificate III in Customer Engagement
Certificate III in Financial Services
Certificate III in Hospitality
Certificate III in Information, Digital Media and Technology
Certificate III in Micro Business Operations
Certificate III in Recordkeeping
Certificate II in Automotive Sales
Certificate II in Business
Certificate II in Community Pharmacy
Certificate II in Emergency Medical Service First Response
Certificate II in Hospitality
Certificate I in Hospitality



A full list of **Tier 4** (Low Priority) Industry Prioritised Qualifications are available in the IPQ Dataset

www.tasc.sa.gov.au





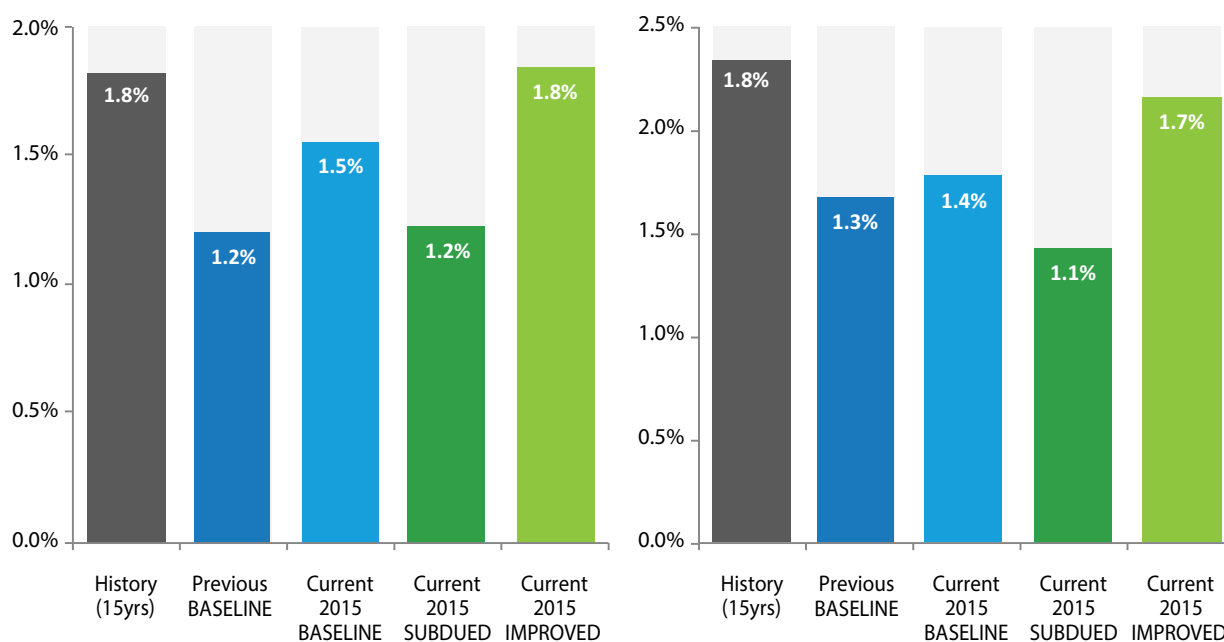
7.18 Transport, Postal and Warehousing

Employment Outlook

According to the Commission's interim modelling, employment in the Transport, Postal and Warehousing Industry is projected to increase 1.5 percent a year over the next five (5) years under the baseline scenario. This compares with a rate of growth over the past 15 years of 1.8 percent per annum.

Over the long-term (2014-15 to 2024-25), the Industry is expected to record continued employment growth above the State average. As a result, its share of the State's employment is projected to increase from 4.8 percent to 5 percent.

**Figure 93 - Transport, Postal & Warehousing, Average Annual Employment Change
2014-15 to 2019-20 and 2014-15 to 2024-25**



Source: Interim TaSC Economic Modelling, 2015

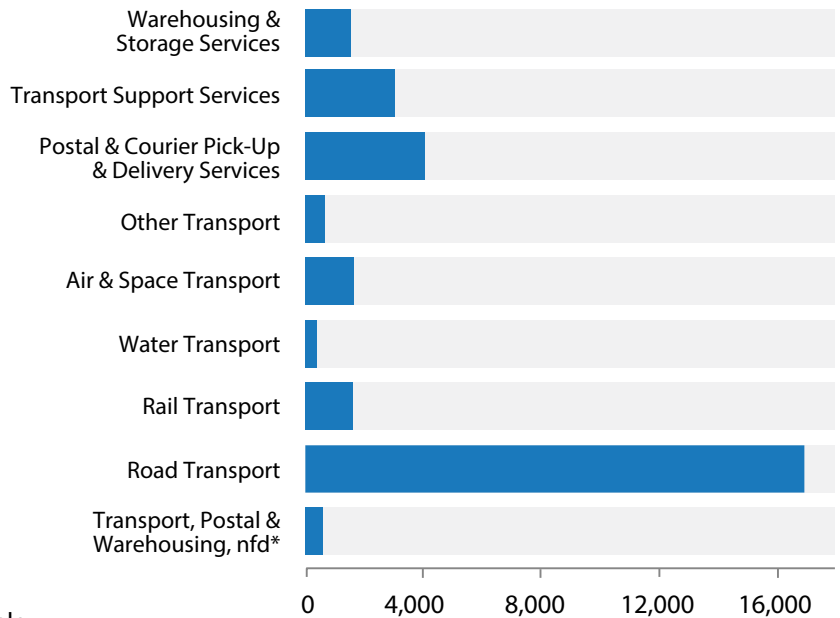
Industry Outlook

Job growth in the Transport and Logistics Industry is expected to average 5.6 percent through the period 2013-18. Freight volumes have tripled over the last three decades and passenger movements through Australia's airports have more than quadrupled. New and enhanced technologies in the form of robotics, automation, wireless sensor networks, intelligent objects, smart packages, mobile devices and Big Data are being used across the Industry to enhance operational efficiency⁸¹.

The South Australian transport sector directly employs 51,200 people (6.4 percent of the State's workforce) with employment dominated by males (87.4 percent of total employment). The majority of employment is full-time (69.9 percent) and the age profile of the workforce is younger than the State average. The most common qualifications are Certificate III or IV (held by 17.7 percent of workers); however almost three quarters of the workforce have no post-school qualifications.⁸²

The performance of the Transport, Postal and Warehousing Industry is closely linked to the economic cycle. In South Australia, the next section of the North South Corridor to be delivered will be a 3.7km stretch of South Road between Torrens Road and the River Torrens. This new section of road will significantly improve travel times for both north-south and east-west bound traffic.

Figure 94 - Transport, Postal & Warehousing, Employment by Sub-Sector



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

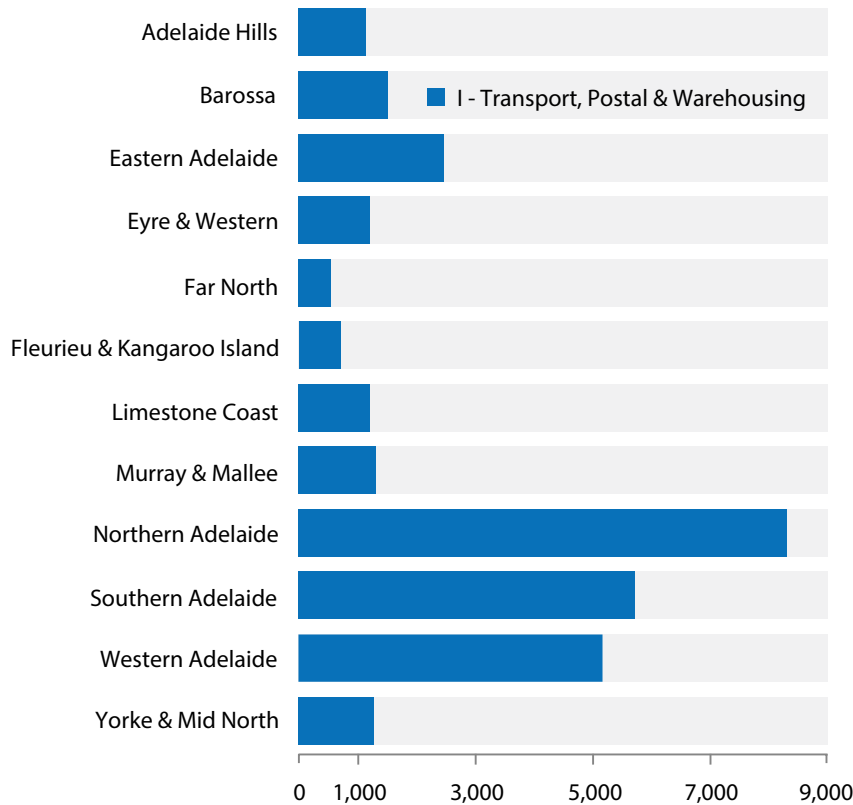
The Commonwealth and State Governments have committed \$896 million to construct the Torrens Road to the River Torrens Project. The project will create an estimated 480 jobs per year during the construction phase. It is expected that the project will commence mid-2015 and is scheduled for completion by the end of 2018⁸³.

81 - <http://www.tdtsa.com.au/downloads/TDTSAPercent20Strategicpercent20Planpercent202015percent20-percent202016.pdf>

82 - <http://www.tdtsa.com.au/downloads/TDTSAPercent20Strategicpercent20Planpercent202015percent20-percent202016.pdf>

83 - <http://www.tdtsa.com.au/downloads/TDTSAPercent20Strategicpercent20Planpercent202015percent20-percent202016.pdf>

Figure 95 - Transport, Postal & Warehousing, Employment by Region



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011

Skills needs

Survey respondents ranked the Work Health and Safety (WHS) skills cluster as having the highest importance, followed by the Sales and Customer Service, and Managerial and Leadership skills clusters.

Entrepreneurial and Language, Literacy and Numeracy (LLN) skills clusters were ranked of lowest importance by the Transport, Postal and Warehousing Survey respondents.

Table 37 - Transport, Postal & Warehousing, Ranked Skills Clusters

Skills Clusters	This Industry	All Respondents	Compare
Work Health & Safety (WHS)	1	4	↑
Sales & Customer Service	2	2	↔
Managerial & Leadership	3	1	↓
Administration & Support	4	5	↑
Information & Technology	5	3	↓
Sustainability & Environmental	6	9	↑
Marketing & Engagement	7	7	↔
Human Resources	8	8	↔
Financial	9	6	↓
Language, Literacy & Numeracy (LLN)	10	10	↔
Entrepreneurial	11	11	↔

Workforce development themes and issues

The business composition of the Transport, Postal and Warehousing Industry shows that 66.7 percent are self-employed, and 30 percent have less than 20 employees. Small businesses cannot always afford the costs or time of additional training.

Despite huge strides in available technology, Transport and Logistics businesses differ in their ability to innovate through the introduction of technology due to varying levels of digital literacy in their workforce and capital availability.⁸⁴

This age profile is particularly visible in the road, rail and maritime sectors. With a large proportion of workers aged 45 years and above intending to retire in the next decade, succession planning is a pressing issue for employers. This is particularly true for rural and remote operations, where the workforce tends to be older than in metropolitan areas.

In the coming years, the ability to successfully attract, train and retain young workers will become more critical but efforts will be required to make the Industry attractive and provide career pathways.

World air cargo is expected to grow placing further demand on ground crew. Retention of baggage handlers and ground crew continues to be a challenge and further improvements are required.

The rail workforce in mining is being impacted by the use of driverless trains. This may free up some workers to meet the expected increases in rail freight but also places demand for higher-level skills. While maritime freight transport slows, in line with reduced mining and resources activity, the cruise market is growing rapidly creating demand for multi-skilled seafaring workers at all levels⁸⁵.

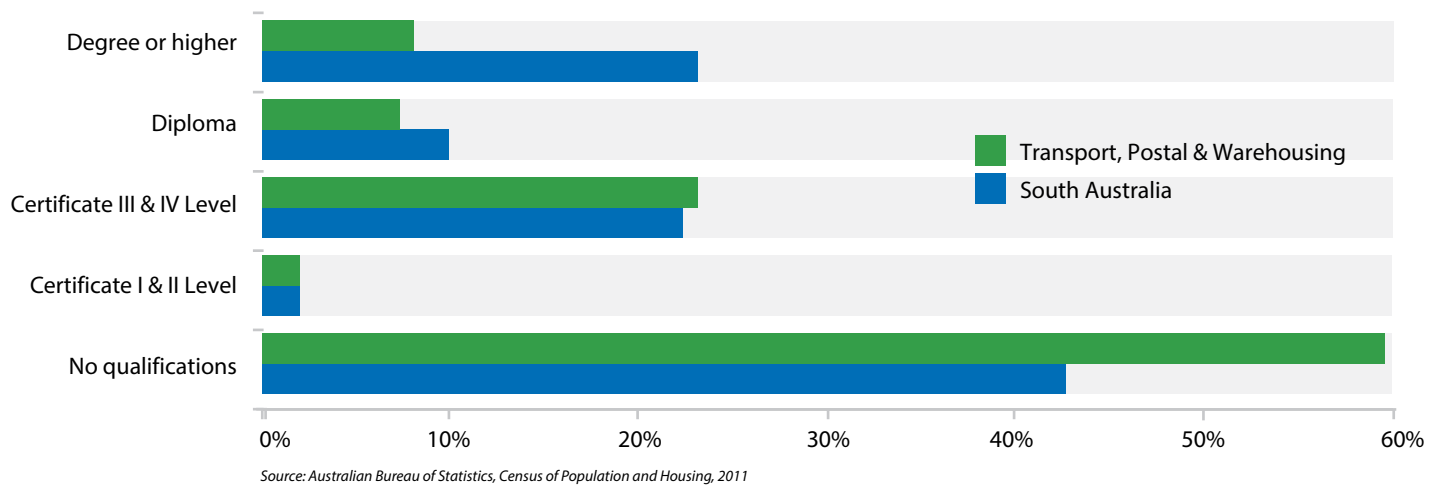
The South Australian Transport and Logistics Industry has a number of workforce challenges including the ageing workforce and thin training markets in some sectors like rail operation, rail infrastructure and aviation. Training is largely driven by legislative changes addressing fatigue management and national licensing requirements. For parts of the Road Transport Industry, there has been reluctance over the past three years to invest in training, due to the time it takes to train (up to five years), the costs involved and the issue of retention⁸⁶.

84 - http://tlisc.org.au/wp-content/uploads/TLISC_134_E-Scan_lores_singlepages_FA.pdf

85 - http://tlisc.org.au/wp-content/uploads/TLISC_134_E-Scan_lores_singlepages_FA.pdf

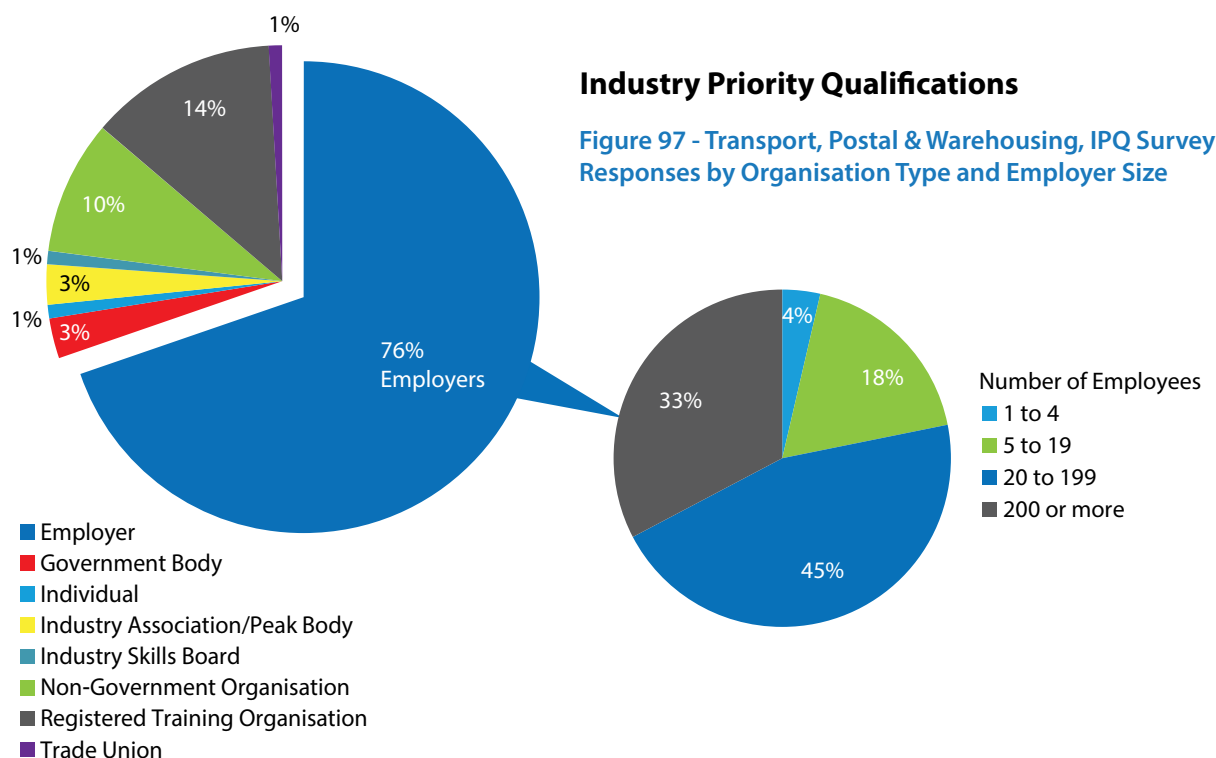
86 - <http://www.tdtsa.com.au/downloads/TDTSAPercent20Strategicpercent20Planpercent202015percent20percent202016.pdf>

Figure 96 - Transport, Postal & Warehousing, Employment Share by Post-School Qualification Level



Industry Priority Qualifications

Figure 97 - Transport, Postal & Warehousing, IPQ Survey Responses by Organisation Type and Employer Size



The Transport, Postal and Warehousing Industry received a total of 72 responses to the Survey. This was the third highest for any Industry and was one of several that received far more responses than the targeted number. The sub-sector distribution was generally quite good.

Almost 80 percent of respondents in this Industry were medium or large employers. Over

half of the employers reported likely additions to staff in the short to medium-term.

This industry had excellent stakeholder representation. The consultation sessions had robust discussion, particularly around qualifications from the more niche sub-sectors. Several qualifications in these sub-sectors were reprioritised, but overall the number of changes were relatively modest.

Table 38 - Transport, Postal & Warehousing, Prioritised Qualifications

Transport, Postal and Warehousing

Tier 1 (Highest Priority)

Certificate III in Driving Operations
Certificate III in Logistics
Certificate II in Driving Operations
Certificate II in Warehousing Operations

Tier 2 (High Priority)

Certificate IV in Logistics
Certificate IV in Train Driving
Certificate IV in Transport and Logistics
(Road Transport Heavy Vehicle Driving Instruction)
Certificate IV in Work Health and Safety
Certificate III in Maritime Operations
(Marine Engine Driver Grade 2 Near Coastal)
Certificate III in Maritime Operations
(Master up to 24 metres Near Coastal)
Certificate III in Stevedoring
Certificate III in Warehousing Operations
Certificate III in Waste Driving Operations
Certificate III in Work Health and Safety
Certificate II in Maritime Operations
(Coxswain Grade 1 Near Coastal)
Certificate II in Road Transport Yard Operations
(Freight Handler)
Certificate II in Logistics

Tier 3 (Priority)

Advanced Diploma of Work Health and Safety
Diploma of Leadership and Management
Diploma of Logistics
Diploma of Work Health and Safety
Certificate IV in Leadership and Management
Certificate IV in Maritime Operations
(Master up to 35 metres Near Coastal)
Certificate IV in Transport and Logistics
(Road Transport - Car Driving Instruction)
Certificate IV in Warehousing Operations
Certificate III in Business Administration
Certificate III in Furniture Removal
Certificate II in Automotive Servicing Technology
Certificate II in Emergency Medical Service First Response
Certificate II in Furniture Removal
Certificate II in Maritime Operations
(Marine Engine Driver Grade 3 Near Coastal)
Certificate II in Rail Infrastructure
Certificate I in Logistics
Certificate I in Transport and Logistics (Pathways)
Certificate I in Warehousing Operations

A full list of **Tier 4** (Low Priority) Industry Prioritised
Qualifications are available in the IPQ Dataset
www.tasc.sa.gov.au



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Appendix C: Economic Modelling

The results from the IPQ survey were moderated with reference to the Commission's Interim Economic Modelling. This Appendix provides an overview of the modelling process.

Overview

Projecting the future of the South Australian economy inevitably involves uncertainty. To better understand the significance of this uncertainty, the projections for economic growth and structural change have been derived using sensitivity tests around a baseline. In the short term, the baseline is informed by Department of Planning Transport and Infrastructure (DPTI) projections of adult population growth and State Treasury projections for employment growth, Gross State Product (GSP) growth, and the unemployment rate. In the longer term, the baseline relies on a combination of DPTI projections of adult population growth, State Treasury unemployment rate projections and Commonwealth Treasury participation rate and productivity growth projections.

The sensitivity analysis involves the variations from the baseline listed below.

- **Improved:** Deviation from the current baseline with the economy returning to full employment and with the participation rate rising as older workers stay engaged in the workforce and youth unemployment begins to fall. This sensitivity assumes significant job creation in the new industries for South Australia alongside productivity growth exceeding recent trends.
- **Subdued:** Deviation from the current baseline in a manner generally consistent with prevailing trends of rising unemployment, falling participation and subdued productivity growth. This sensitivity assumes South Australia continues to struggle to attract business investment, secure export markets or find other sources of new employment. It may also represent a failure at a political level to deal with structural and technological change in the economy.

Economic Assumptions

The table below provides the broad macroeconomic assumptions for the baseline and sensitivity tests over the period 2014-15 to 2024-25.

Table 39 Key Macroeconomic Assumptions

Key Macroeconomic Variables	History (15yrs)	Previous 2014 BASELINE		Current 2015 BASELINE		Current 2015 SUBDUED		Current 2015 IMPROVED	
		Short term	Long term	Short term	Long term	Short term	Long term	Short term	Long term
		(to 2017-18)	(to 2024-25)	(to 2019-20)	(to 2024-25)	(to 2019-20)	(to 2024-25)	(to 2019-20)	(to 2024-25)
South Australia									
Adult Population	1.0%	1.0%	1.0%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%
Labour Force	1.2%	0.8%	0.8%	0.9%	0.9%	0.7%	0.7%	1.1%	1.1%
Employment	1.23%	0.6%	1.0%	1.1%	1.0%	0.7%	0.8%	1.3%	1.3%
Unemployment	0.2%	4.7%	0.1%	-1.9%	-1.4%	-0.1%	0.1%	-2.7%	-2.1%
Participation Rate*	62.1%	62.5%	62.8%	62.1%	62.0%	61.5%	61.0%	62.8%	63.5%
Unemployment Rate*	6.9%	6.9%	5.2%	6.0%	5.5%	6.7%	6.5%	5.7%	5.0%
Gross State Product	2.4%	2.2%	2.6%	2.2%	2.3%	1.7%	1.8%	2.9%	2.8%
Productivity	1.1%	1.6%	1.5%	1.1%	1.3%	1.0%	1.0%	1.5%	1.5%

*For the participation rate and unemployment rate, end of the period rates are shown as opposed to average annual growth rates.

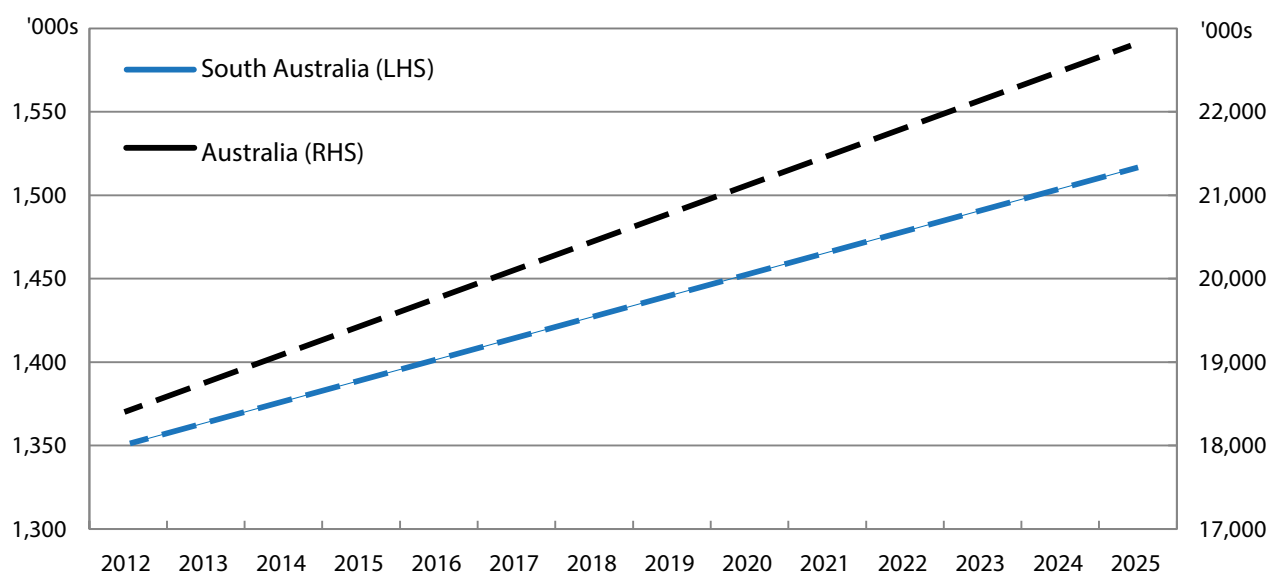
Between 2014-15 and 2019-20, it is estimated that Gross State Product (GSP) in South Australia will grow by at least 2.2 percent a year, but may grow by as much as 2.9 percent a year if the Australian economy experiences strong growth, particularly as the effects of the weaker dollar flow through. This 2.2 percent projected average growth rate is comparable to the GSP projection presented in our 2014 Plan (noting that current projections represent a further two years of data) as well as South Australia's historical growth rate. The current baseline has slightly weaker growth in the longer term than previously projected.

The improvement in the baseline unemployment rates since the 2014 Plan reflects an assumption that South Australia is progressing through the contractionary phase of the business cycle.

Population growth

The adult population aged 15 years and over in South Australia is predicted to increase to more than 1.5 million people by 2025, or annual average growth of 0.9 percent, according to projections from DPTI. This compares to an average annual growth rate of 1.6 percent for all of Australia according to the Australian Bureau of Statistics (ABS), reaching a total adult population of almost 23 million people by 2025.

Figure 98 Adult (15+) Population Growth Projections, 2014-15 to 2024-25

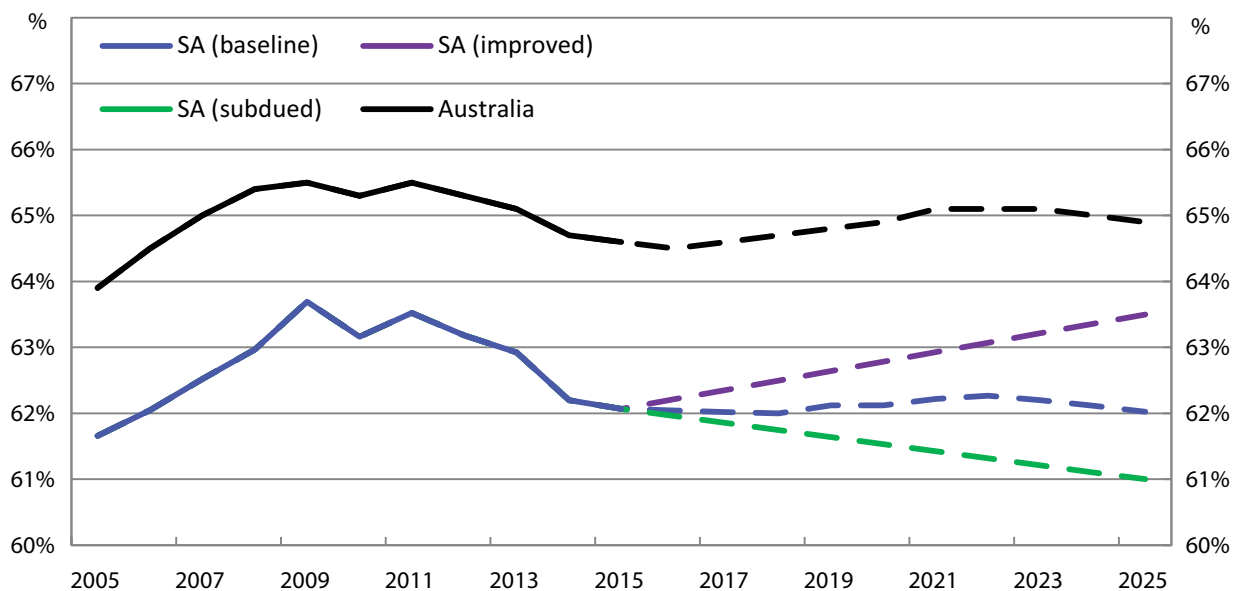


Sources: ABS (Series B); DPTI (medium series)

Labour force participation

Labour force participation rates vary under each of our sensitivity tests. Participation rates are obtained from State Treasury unemployment rate and employment growth projections, DPTI adult population projections, and Commonwealth projections in the Intergenerational Report, adjusted for South Australia.

Figure 99 Labour Force Participation Projections, 2014-15 to 2024-25



Sources: Commonwealth Treasury Intergenerational Report; internal calculations

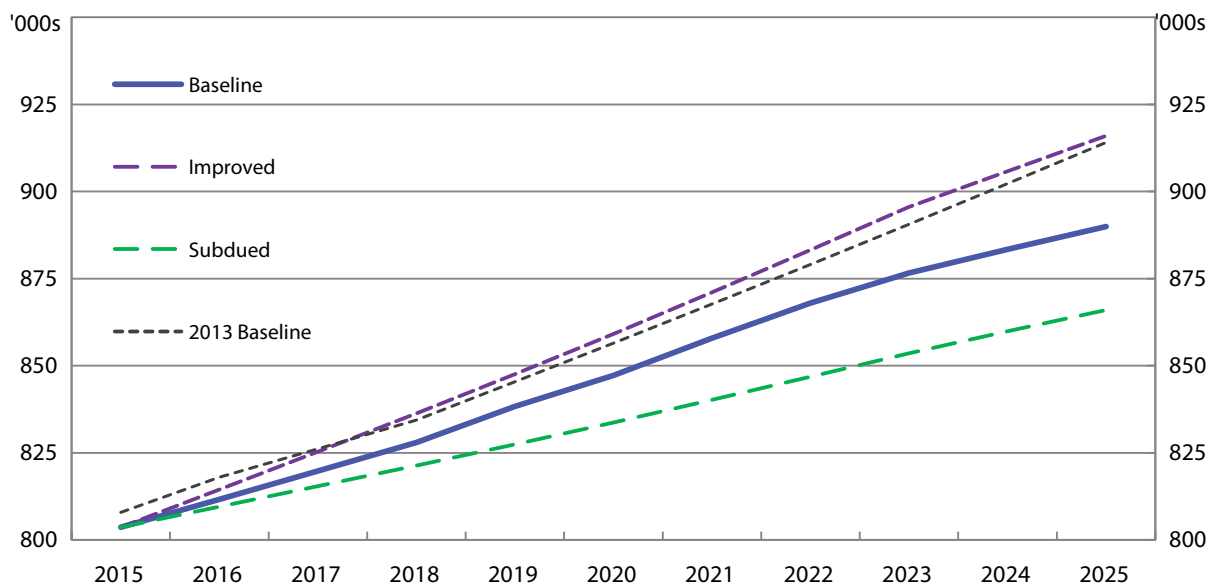
Under our baseline projection the participation rate in South Australia hovers at around 62 percent, and is consistently around 3 percentage points below the national participation rate. Our improved and subdued sensitivities project the participation rate to vary from the baseline, underpinned by assumptions on the nature of the future workforce.

Employment growth

It is estimated that growth in the South Australian economy will increase employment by almost 43,000 jobs over the five-year period 2014-15 to 2019-20.

Over the 10-year period 2014-15 to 2024-25, the baseline projection is that growth in the South Australian economy will create 86,000 new jobs, but with an upper possibility of as many as 112,000 new jobs. Compared with our 2014 projections, employment growth is projected to be slightly weaker, particularly in the outer years.

Figure 100 Employment Growth Projections, 2014-15 to 2024-25



Employment projections in the baseline are consistent with State Treasury projections in the shorter term and are derived from our participation rate and unemployment rate projections for the outer years. Employment projections vary under each of our sensitivity tests in accordance with different participation rate and unemployment rate projections. Under our baseline, the unemployment rate slowly recovers to 5.5 percent as South Australia emerges from a contractionary period.

This expansion is emphasised in our improved scenario, with stronger employment growth as unemployment falls to 5 percent alongside increasing participation. In our subdued scenario, employment growth is weaker as the participation rate falls with the retirement of baby boomers and unemployment remains stubbornly high as South Australia struggles to transition to the new economy.

Industry growth

Employment growth projections by industry are informed by historical trends and a variety of public and private sources, including through our extensive consultation work with industry. This year, as part of our IPQ Output 1 consultation sessions, we obtained valuable feedback from industry stakeholders regarding the future of employment for each industry.

Under our baseline projections the industry structure of South Australia would see an economy more reliant on Health Care and Social Assistance, Education and Training, and Professional, Scientific and Technical Services, but less reliant on the Manufacturing industry sector.

Compared with our previous projections, Agriculture, Forestry and Fishing, and the Food and Accommodation Services industry sectors obtain a higher industry share, largely as a result of the lower Australian dollar, while the Mining industry deteriorates on the back of low commodity prices.

Figure 101 Projected Industry Shares

Industries	Current Share	Previous		Current	
		2014 BASELINE		2015 BASELINE	
		Short term	Long term	Short term	Long term
		(to 2017-18)	(to 2024-25)	(to 2019-20)	(to 2024-25)
South Australia					
Agriculture, Forestry and Fishing	5.4%	3.9%	3.5%	5.2%	5.1%
Mining	1.6%	1.5%	1.5%	1.5%	1.3%
Manufacturing	8.9%	7.5%	5.7%	7.4%	6.6%
Electricity, Gas, Water and Waste Services	1.3%	1.1%	0.9%	1.3%	1.3%
Construction	7.5%	7.6%	7.9%	7.3%	7.0%
Retail and Wholesale Trade	13.6%	14.7%	14.0%	13.5%	13.2%
Accommodation and Food Services	6.6%	6.2%	5.8%	6.9%	7.1%
Transport, Postal and Warehousing	4.8%	4.6%	4.6%	4.9%	5.0%
Information Media and Telecommunications	1.5%	1.6%	1.5%	1.4%	1.4%
Financial and Insurance Services	2.7%	2.8%	2.9%	2.7%	2.6%
Rental, Hiring and Real Estate Services	1.4%	1.7%	1.6%	1.4%	1.3%
Professional, Scientific and Technical Services	6.5%	6.3%	7.1%	6.6%	6.9%
Administrative and Support Services	3.3%	3.1%	3.1%	3.3%	3.3%
Public Administration and Safety	6.0%	6.6%	6.4%	5.9%	5.8%
Education and Training	8.1%	9.1%	9.9%	8.5%	8.9%
Health Care and Social Assistance	14.9%	16.1%	18.3%	16.3%	17.7%
Arts and Recreation Services	1.8%	1.6%	1.6%	1.8%	1.8%
Other Services	4.0%	3.9%	3.7%	3.9%	3.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Note: 'Current Share' represents existing shares in June 2015.

Short-term in the previous update was 2012-13 to 2017-18; long-term in the previous update was 2012-13 to 2024-25.

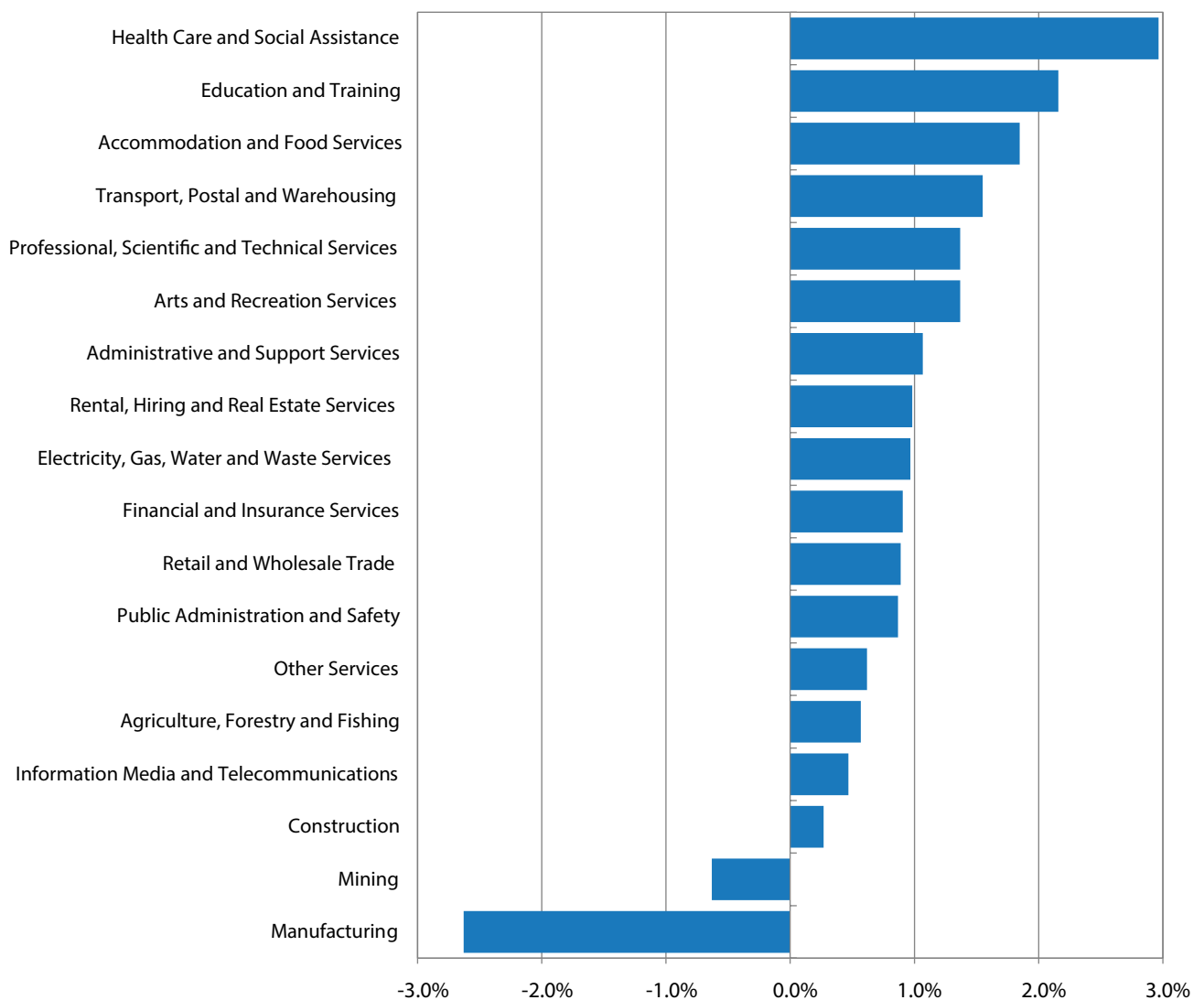
Short-term in the current update is 2014-15 to 2019-20; long-term in the current update is 2014-15 to 2024-25.

By industry, Health Care and Social Assistance is expected to experience the fastest annual growth rates, with Education and Training also expected to record strong growth. Manufacturing is expected to continue to decline. Note that our industry growth rates are adjusted to conform to our overall macroeconomic assumptions.

Figure 102 Projected Growth Rates By Industry

Industry Employment Growth Projections, 2014-15 to 2019-20

Baseline Scenario, Average Annual Growth Rates



Sources: ABS; CEET; DEA; DIAC; TaSC; author's calculations

Number of VET qualifications

In Skills for Future Jobs 2014, Commission modelling projected future industry demand for new qualifications. This interim IPQ report presents the qualification demand projections from the 2014 report, which will be updated for the final IPQ report to be released in March 2016.

The future demand for new qualifications is a function of the number of job openings and the changing qualification needs of employees over the period (or skills deepening). The projections for each of these components were used to determine the demand for new qualifications by each of the five groups of workers (or potential workers) listed below:

- Skilling requirements of new entrants (to fill job openings resulting from employment growth and replacement demand).
- Upskilling of existing workers (completing a qualification at a higher level than their current highest level qualification).

- Existing workers gaining a qualification at an equivalent or lower level (referred to as 'skills broadening').
- Demand by people needing to undertake lower level qualifications before they can attain the higher-level qualifications needed by industry (i.e. 'pathways' demand).
- Demand by people who are not employed and who represent a necessary reserve capacity (that is, reserve labour force demand).

The 2014 Plan provided three alternative scenarios in addition to the baseline scenario.

Figure 103 Total Demand for New Qualifications, 2012-13 to 2017-18

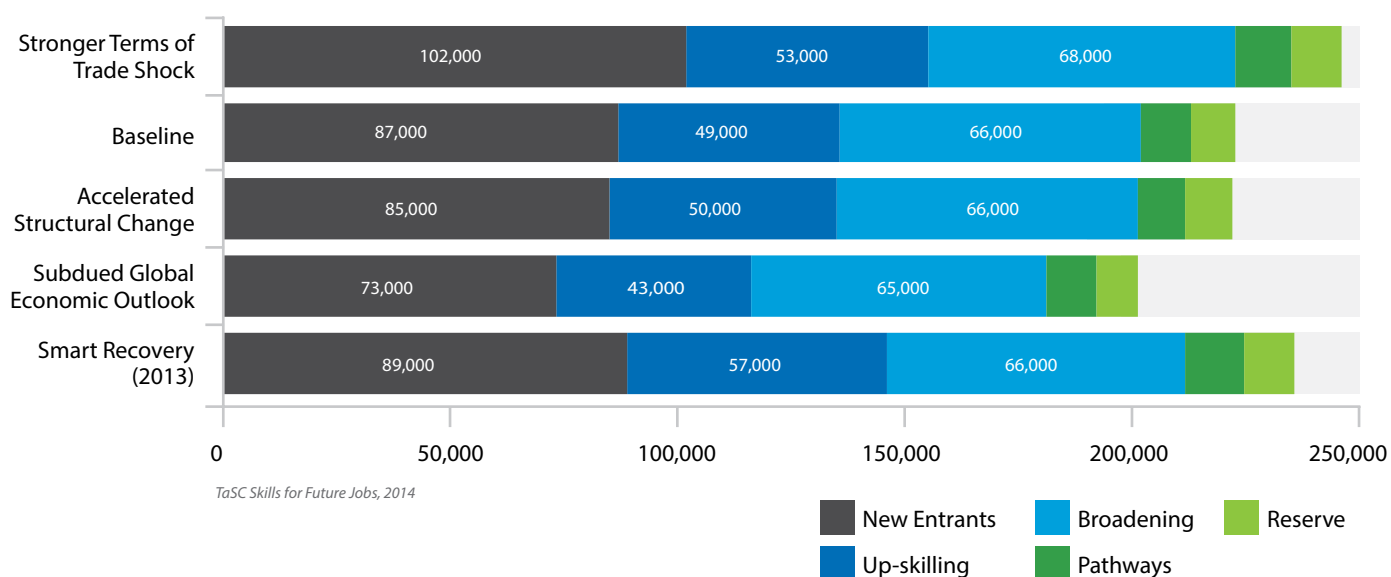
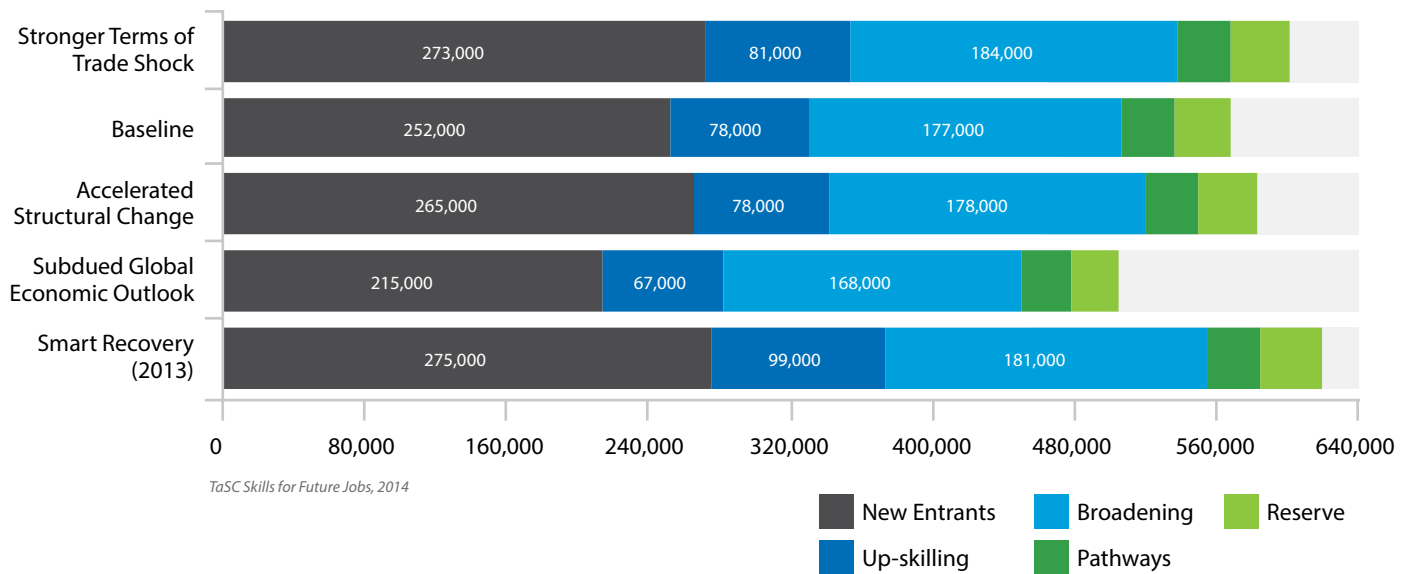


Figure 104 Total Demand for New Qualifications, 2012-13 to 2024-25

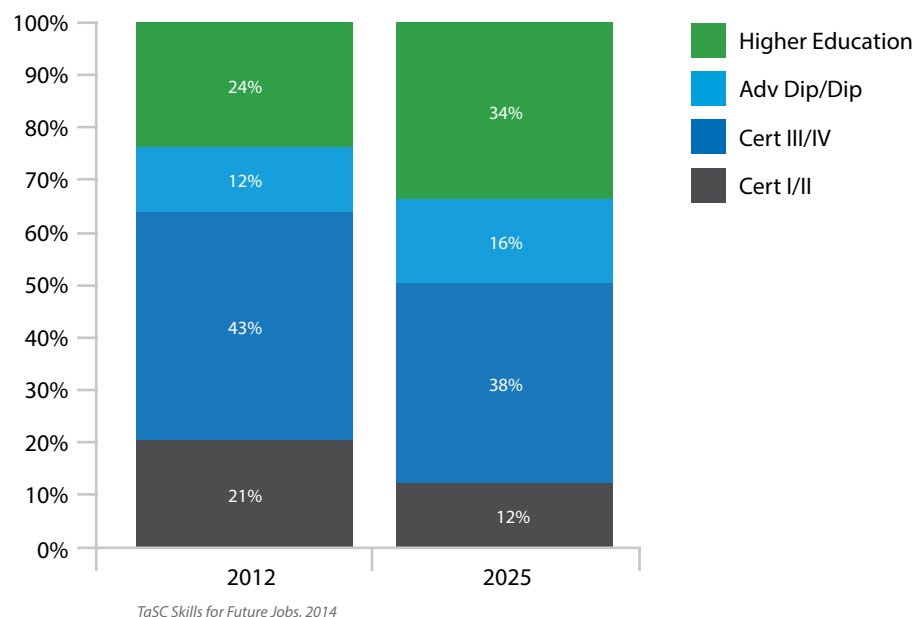


Level of qualification

New entrant demand for qualifications is influenced not only by the number of job openings, but also the corresponding need for qualifications that enable these new entrants to be appropriately qualified for the job openings on offer. It is assumed that the qualification

profile of younger workers better reflects today's qualification requirements to enter each occupation. Therefore, the qualification demands of new entrants for each occupation are derived by combining the number of job openings with qualification profiles but with weightings favouring the younger workers.

Figure 105 The Changing Qualification Profile, 2012 to 2025



Appendix D: Stakeholder Consultation Process

Scope of work and deliverables

The Commission has provided the following platforms for consultation purposes:

- i. Consultation plan
 - a. identifying the methodology, timeframes and resources for consultation
- ii. Online Survey
 - a. develop and distribute an electronic based Survey to provide stakeholders a consultation mechanism to provide feedback.
- iii. Industry feedback (summary reports) include:
 - a. the identification of the top Priority Qualifications for each industry sector
 - b. The identification and aggregation of Priority Qualifications across the Whole of Economy
 - c. raw industry intelligence gathered through stakeholder consultations focussing on the emerging workforce themes and issues in each industry sector; and
 - d. any other relevant stakeholder feedback gathered during consultations

The Commission will not:

- i. provide or seek feedback specific to fundamental policy elements of the Government's repositioned training, skills and employment policy
- ii. provide or seek feedback relating to the volume of funded training places allocated to specific qualifications; or
- iii. seek or receive further stakeholder feedback relating specifically to Industry

Priority Qualifications following the conclusion of the consultation period

Consultation principles

The Commission is committed to widespread public consultation to guide our decision making in accordance with the following principles.

- i. independent, fair and balanced by ensuring our processes reflect our objectives and are informed by industry
- ii. open and transparent by publishing our consultation timelines on our Website and distributing information as soon as available to stakeholders
- iii. effective in identifying priority issues, providing well-targeted opportunities for consultations and making decisions in a timely manner
- iv. considerate of the varying information needs and accessibility levels for a range of stakeholders by offering consultations tailored to the needs of particular cohorts
- v. accessible to, and inclusive of, all relevant stakeholders by providing reasonable opportunity and time frames to participate in consultation processes
- vi. representative in the way in which we provide information collected through consultation to the Department and the Minister that reflect stakeholder feedback; and
- vii. efficient by minimising the expenses of our consultation activities and

seeking to ensure that the costs of consultation do not exceed the benefits expected.

Process of consultation

The Commission's program of consultation included a range of stakeholders, conditioned to the topic, scope, timeframe and sensitivities of the subject matter. Consultations where applicable were tailored to reflect the nature of the target group, industry or activity, any legislative, regulation and licencing

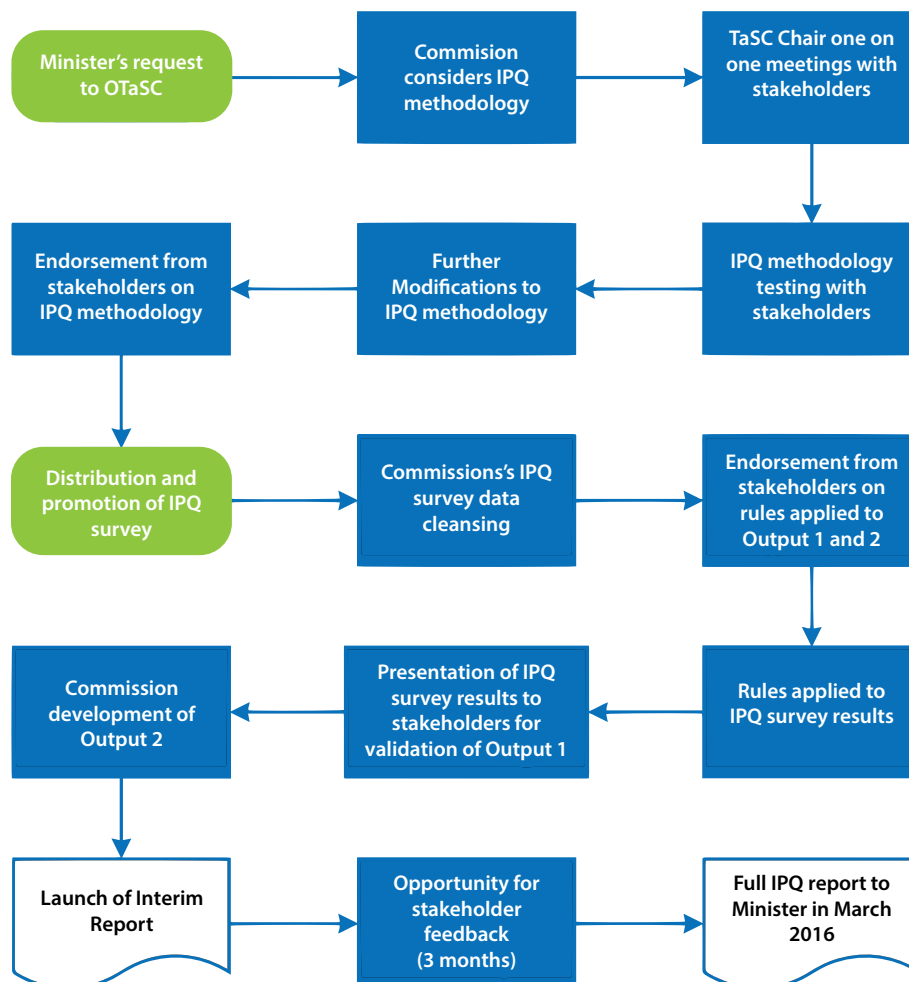
Figure 106 Consultation Mechanisms

Type of Consultation	Description
Verbal correspondence	Informal and unstructured information exchange via telephone.
Written correspondence	Personally addressed letter informing stakeholder of opportunity to provide feedback.
In person meetings	Informal, semi informal or formal discussion either one-to-one or in small groups
Website	Consultation information posted on TaSC website.
Media release	Media release issued by the Minister as part of the repositioned policy announcement.
Online survey	Structured survey with targeted questions.
Business intelligence	Engaging with existing mechanisms to gather business intelligence across the Department.

requirements and implications for stakeholders.

The Commission utilised a range of mechanisms to ensure an inclusive and transparent process of

consultation (see figure below):



The Commission's consultation activity was intended to offer ample opportunity for Industry stakeholders to provide genuine advice in relation to the identification of South Australia's priority VET qualifications (see figure below):

Figure 107 Consultation Activity

The Commission's advice (based on stakeholder feedback) will be one (of five) inputs that will inform future iterations of the STL and the repositioned, 'Work Ready' policy announced in April 2015.

Other factors of the decision making matrix that will inform future iterations of the STL is the Commission's economic modelling on demand for qualifications and job openings, the Public Value Framework, South Australia's Strategic Priorities (Premier's 10 Point Economic Plan) and an assessment of the budgetary environment.

The Office of the Training and Skills Commission welcomes written submissions and feedback in relation to the information contained in this

document (provided that it is received by COB on 15 February 2015).

Further details are outlined in our Consultation Activity Schedule and Consultation Mechanisms document.

Industry Partners

The Commission consulted with industry stakeholders, representing a broad cross section of industries including:

- Industry associations/bodies
- Government agencies
- Employer Groups
- Training Providers and;
- Unions.

Confidentiality and privacy

If stakeholders provide information on a confidential or commercially-sensitive basis, and make this formally known to the Commission, we will not have this information disclosed without consent, unless the Commission is required to do so by law.

It is the responsibility of the stakeholder to formally advise the Office of the Training and Skills Commission in writing if the information disclosed is confidential and not for distribution prior to the end of the consultation period.

Stakeholders will be informed during the scheduled consultation that formal notification on confidentiality and privacy concerns should

be in writing to;

Mr. Joshua Rayner
Director
Office of the Training and Skills Commission
GPO Box 320
ADELAIDE SA 5001

Informing stakeholders of decisions, determinations and reports

At the conclusion of the Consultation period, we will notify all parties simultaneously that the Interim Report is available via our website at:

www.tasc.sa.gov.au

Appendix E: List of Industry Partners

IPQ Stakeholders - Industry Partners

ACPET (Australian Council for Private Education and Training)
Adelaide Training and Employment Centre (ATEC)
Aged & Community Services SA & NT
AiGroup (Australian Industry Group)
Australian Manufacturing Workers' Union (AMWU)
Australian Medical Association (AMA) (SA)
Arts SA
Association of Independent Schools of South Australia (AISSA)
Australian Maritime & Fisheries Academy (AMFA)
BUSINESS SA (South Australia's Chamber of Commerce and Industry)
Catholic Education South Australia
Construction Industry Training Board
Department for Education and Child Development (DECD)
Early Childhood Australia (ECA) SA
Energy & Resources - Department of State Development (DSD)
Festival Adelaide
Food Tourism and Hospitality (FTH) Industry Skills Advisory Council
Forestworks ISC
Hender Consulting
Housing Industry Association (HIA)
HP Enterprise Services
Local Government Association (LGA) SA
Logging investigation and Training Association Inc.
Master Building Association
Master Plumbers Association of South Australia
Maxima Group
MINTRAC
OneFortyOne Plantations
Primary Industry Skills Council SA
Recreation SA
Real Estate Institute of South Australia (REISA)
Resource and Engineering Skills Alliance (RESA)
SA Freight Council
SA Tourism Industry Council (SATIC)
SA UNIONS
South Australian Chamber of Mines and Energy (SACOME)
South Australian Council of Social Services (SACOSS)
Shop, Distributive & Allied Employees' Association (SDA) SA & NT Branch
Service Skills SA
Sport SA
TaFESA
The Lucas Group
The Water Industry Alliance
Transport Distribution Training SA (TDTSA)
Transport Training Solutions
Transport Workers Union (TWU) SA/NT Branch

Appendix F: Abbreviations and Acronyms

Abbreviation	Description
ABS	Australian Bureau of Statistics
ACE	Adult Community Education
ACELG	Australian Centre of Excellence for Local Government
AISC	Australian Industry and Skills Committee
AQF	Australian Qualification Framework
CALD	Culturally and Linguistically Diverse
FTL	Funded Training List
DPTI	Department of Planning, Transport and Infrastructure
GSP	Gross State Product
GTO	Group Training Organisation(s)
ICT	Information Communication Technologies
IPQ	Industry Priority Qualification(s)
LLN	Language, Literacy and Numeracy
NCVER	National Centre for Vocational Education Research
QSCs	Qualifications, Skill Sets and Accredited Courses
RTO	Registered Training Organisation(s)
STEM	Science, Technology, Engineering and Maths
STL	Subsidised Training List
TVA	Total Vet Activity (NCVER data)
VET	Vocational education and training
WHS	Work Health and Safety





Government of South Australia

Training and Skills Commission

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Disclaimer: The material contained in this Interim Report has been developed by the Training and Skills Commission and was informed through a detailed survey of industry and consultations with key industry partners and groups. The information contained in this Interim Report does not necessarily reflect the views of the Government of South Australia or the Department of State Development, or indicate any commitment to a particular course of action.

The information contained in the Interim Report is provided in good faith and all reasonable care has been taken in its preparation. The Training and Skills Commission recommends users exercise care in interpreting this Interim Report and carefully evaluate the relevance of the material for their purpose and where necessary obtain appropriate advice specific to their particular circumstances.

This plan can be accessed electronically at www.tasc.sa.gov.au

Images have been supplied by the Department of State Development and the South Australian Tourism Commission.

Acknowledgements: The Training and Skills Commission expresses its sincere gratitude to its key industry partners and industry stakeholders who responded to the IPQ survey and have provided detailed information to inform this Interim Report. The Commission also acknowledges the contributions of Joshua Rayner, Angela Niedorfer, Heidi Greaves, Joel Pillar and Kimberley Hoey in producing this interim report.

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