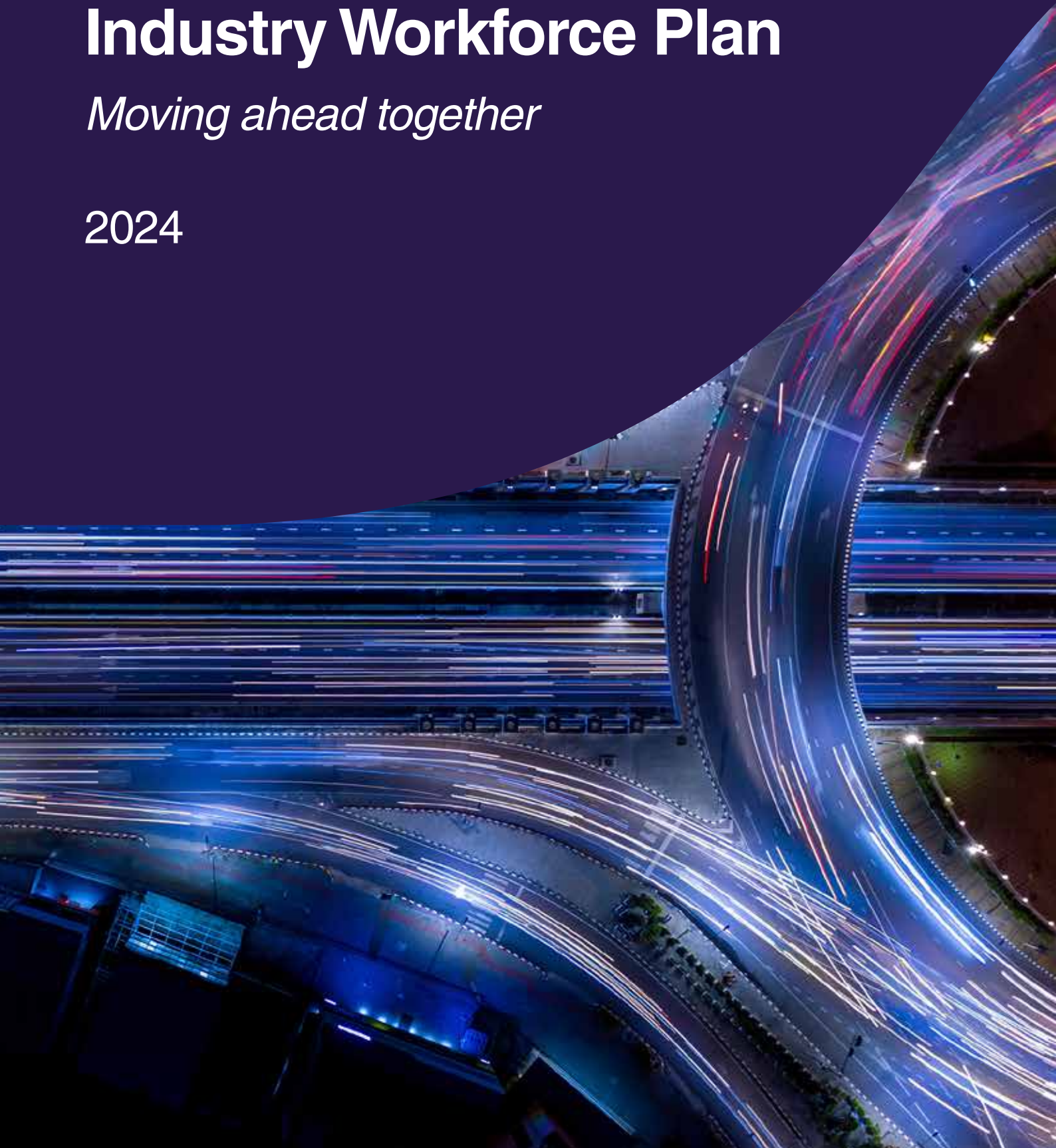


# Industry Workforce Plan

*Moving ahead together*

2024




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# Acknowledgement of Country

In delivering our 2024 Workforce Plan we acknowledge the Traditional Custodians of the lands on which we live and work.

We acknowledge Traditional Custodians of Country throughout Australia and their connections to land, sea and community.



Workforce Plan 2024. Version 1.3  
August 2024

Featured Image: Ptilotus Exaltatus

Thank you to MTA NSW for allowing the use of their images in the Workforce Plan 2024, Automotive section.

The Mining and Automotive Skills Alliance (AUSMASA) is a Jobs and Skills Council funded by the Australian Government Department of Employment and Workplace Relations. ©Mining and Automotive Skills Alliance (AUSMASA)

## CEO foreword

Building on our Initial Workforce Plan 2023 – *The Future is Now*, I am proud to present AUSMASA’s Workforce Plan for 2024 – *Moving Ahead Together*. This plan brings together our key activities, projects, and priorities and explores a range of new economic insights and contemporary workforce data in support of the mining and automotive industries.

The mining and automotive industries have a long and rich history in Australia. They are innovative industries that are actively engaging in initiatives to support Australia’s net zero ambitions and establish new sustainable pathways to strengthen and secure domestic supply and value chains. Challenges such as these and their associated innovative solutions will not be realised without fit-for-purpose vocational education and training (VET) and workforce planning. Without this, we risk further skills shortages in these (and associated) industries.

AUSMASA is enthusiastically and impactfully tackling challenges faced by the VET sector, employers, and unions. Within this work, our 10-point Strategic Plan developed at our *Critical Minerals and Electric Vehicle Skills Forum 2023* stands out as a combined, future-focused example of how we can progress innovative solutions to key challenges common to the mining and automotive workforces. We build on this success in this Workforce Plan.

Our stakeholder work needs to be underpinned by up-to-date data and evidence to identify and meaningfully address workforce challenges – which is the role of this Workforce Plan. This year’s plan includes updated and deeper industry-level workforce data on demographics, educational attainment, occupation types, and improved time series data on workforce size and projections out to the 2030s. Coupled with existing VET data on specific training packages, this plan provides a broader and more granular evidence base of workforce and student-level data to identify and help propose solutions to workforce challenges faced by our industries.

As AUSMASA continues to deepen its workforce planning, stewardship, and other functions, the team and I look forward to continuing our work with our education, industry, and workforce stakeholders to address critical and emerging issues for these important industries.

I hope you find this workforce plan valuable in your work. Thank you for your ongoing commitment and support; we look forward to moving ahead together!

**Dr Gavin Lind**

**Chief Executive Officer**



# Executive summary

The Mining and Automotive Skills Alliance (AUSMASA), the Jobs and Skills Council for Australia's mining and automotive sectors, is pivotal in identifying and addressing these industries' workforce needs. By collaborating with stakeholders, AUSMASA aims to ensure vocational education and training (VET) systems align with the evolving demands of both sectors. AUSMASA's 2024 Workforce Plan identifies several focus areas, which AUSMASA will continue to advance. These focus areas are outlined in the [summary of identified areas of focus](#) of this report.

With a combined workforce of approximately 632,700 workers, AUSMASA's industry coverage includes the entire mining and most of the automotive workforce within the Australian and New Zealand Standard Industry Classification (ANZSIC) system. This workforce is projected to grow by over 72,000 workers over the coming decade (~31,000 for mining, ~10,000 for oil and gas extraction and ~31,000 for the automotive industry).<sup>1</sup> AUSMASA provides a focused insight into individual sub-divisions within the mining and automotive industries, analysing trends, drivers, challenges, and opportunities. These sub-divisions are:

## Mining Sub-Divisions

- **Coal Mining**
- **Metal Ore Mining**
- **Non-Metallic Mineral Mining and Quarrying**
- **Exploration and Other Mining Support Services**
- **Oil and Gas Extraction**

## Automotive Sub-Divisions

- **Automotive Retail and Wholesale**
- **Automotive Repair and Maintenance**
- **Automotive Manufacturing**

Considering the national economic setting, characterised by robust population growth and high workforce participation rates, AUSMASA recognises the imperative of addressing productivity challenges to sustain economic growth. Through targeted initiatives, AUSMASA seeks to ensure a skilled and resilient workforce capable of meeting the evolving needs of the mining and automotive industries in the changing economic landscape.

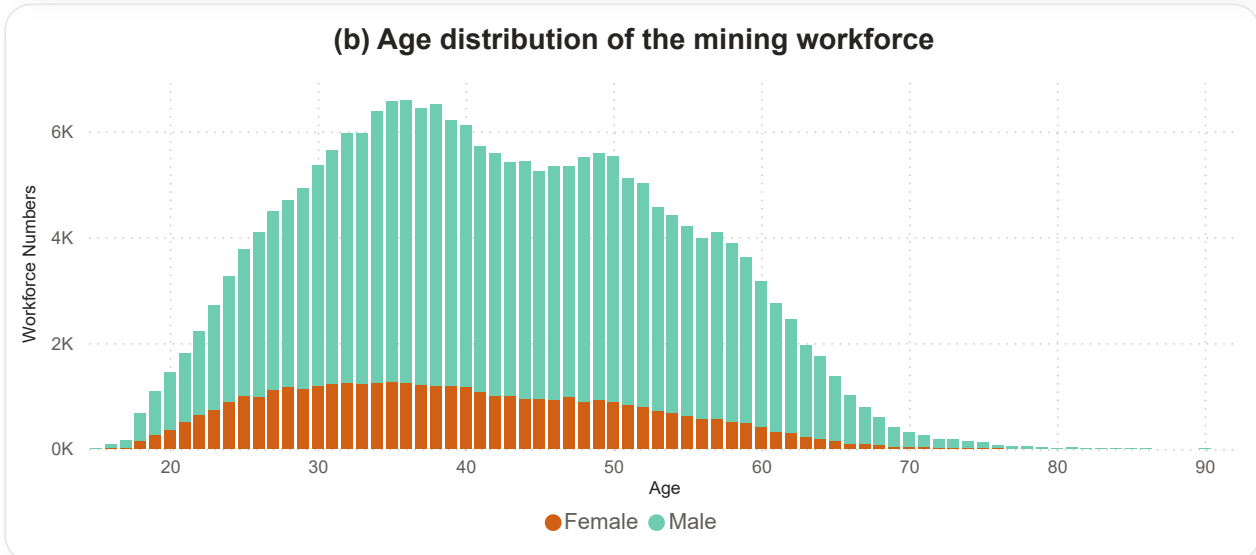
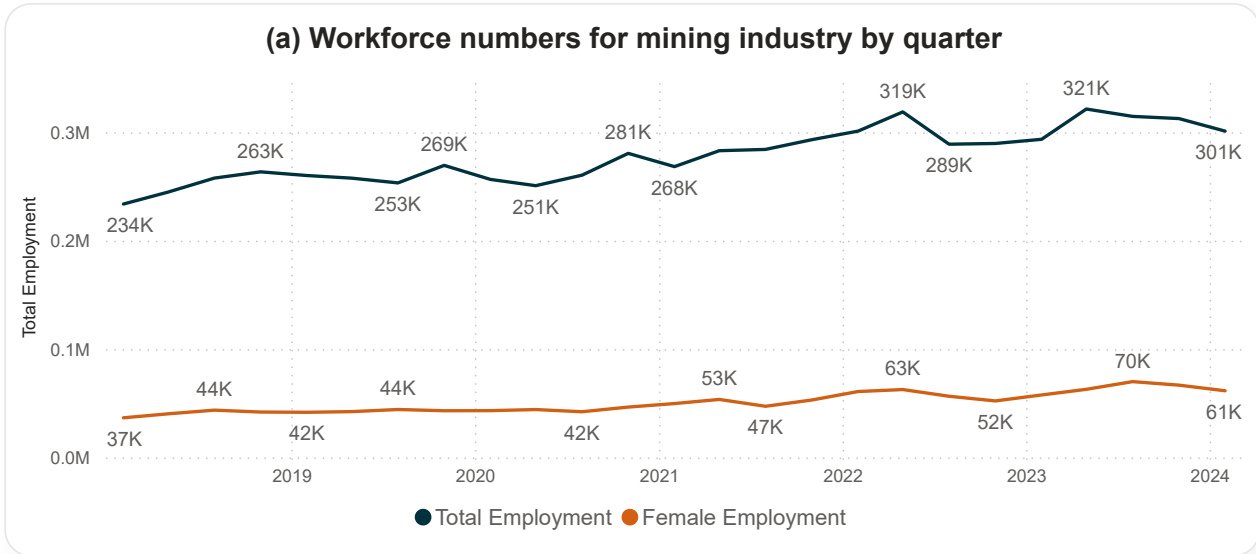
AUSMASA has initiated projects to enhance workforce capabilities in response to industry priorities. These projects include developing training resources for autonomous workplace operations, reviewing emergency response qualifications, identifying and updating superseded units of competency across training packages and commencing the process of mapping the industries' required skills and career pathways to better inform future bodies of work.

AUSMASA is building on its recent research into understanding youth perceptions of mining by undertaking similar market research to understand youth perceptions of automotive careers. AUSMASA is also exploring strategies to attract and retain talent in both industries, including via skilled migration and education pathways.

<sup>1</sup> Jobs and Skills Australia. *'Employment Projections'*, 2023

# Mining industry snapshot

Figure 1: Mining Industry Snapshot Dashboard



**48%**  
of the mining workforce are VET qualified.

**(d)**

Sources: **(a)** ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 **(b)** Census of Population and Housing (AGEP Age and SEXP Sex), 2021, TableBuilder **(c)** ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL (ANZSCO 2013) **(d)** Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder



## The mining industry

The mining industry experienced significant growth, particularly during the 21st-century mining boom when the workforce increased by over 200,000 between 2004 and 2024 and 56,000 between 2020 and 2024, [Figure 1](#), to its current size of almost 312,500 (four-quarter average from May 2023 to February 2024). This growth was driven by the rising demand for industrial and energy commodities from emerging markets. A skilled workforce, innovative technologies, and a stable policy environment supported this growth, making Australia a global leader in mining and resources. This historic growth is projected to continue with the combined mining and oil & gas extraction workforce projected to reach 353,600 by 2033 (a growth of over 41,000 workers: ~31,000 for mining and ~10,000 for oil and gas extraction).<sup>2</sup>

The industry's substantial contributions to the Australian economy are evident. Mining has been the largest source of economic growth in recent years, directly providing a significant portion of the GDP with only 2% of the national workforce. Australia has attracted substantial mining investment, with many of the world's largest mining companies operating in the country, drawn by its geological potential and favourable policies. Mining's export revenue plays a crucial role in Australia's economy, with mineral, metal, and energy commodities accounting for a significant portion of the country's total export income. Beyond its direct economic impact, the mining industry supports a vast domestic supply chain, generating additional employment opportunities across various sectors.

Despite its past success, the mining industry faces many challenges, including transitioning to net zero, declining ore grades, societal expectations, and improving labour productivity. To address these challenges and ensure future sustainability, the industry must focus on skills development, workforce retention, and adopting new technologies to enhance productivity and environmental outcomes.

### Coal mining

Australia's coal mining sector has long been a cornerstone of the nation's economy. It boasts a global competitive advantage through its high-quality coal and is a major source of employment and export income.

Concentrated primarily in Queensland and New South Wales, with additional operations in Western Australia, Victoria, and Tasmania, the industry employs over 50,000 individuals directly and generates substantial additional employment opportunities through its regional supply chains.

<sup>2</sup> Jobs and Skills Australia. *'Employment Projections'*. 2023.

The industry faces significant skill shortages, particularly in critical occupations. One potential solution to these shortages is to attract more women into the workforce. By increasing female participation, the industry can tap into a broader talent pool, thereby addressing the current skill gaps. Additionally, fostering a more inclusive environment can lead to diverse perspectives and innovative solutions, further strengthening the industry's capacity to meet its demands.

While coal remains a major export and source of energy, it is under pressure due to global efforts to reduce reliance on fossil fuels. This transition presents workforce transformation challenges, with initiatives underway to support affected communities and facilitate reskilling for new job roles in clean energy sectors. Opportunities may arise in emerging sectors like critical minerals, but the VET sector must be ready to adapt to evolving demands.

## Metal ore mining

Australia's metal ore mining sector is a global powerhouse driven by its rich mineral reserves and advanced mining technologies.

Metal ore mining occurs across Australia, with key mining hubs like the Pilbara, Kalgoorlie gold fields, and Mt Isa region driving demand for skilled workers. Western Australia accounts for the majority (62%) of the metal ore workforce. The metal ore mining workforce has experienced steady growth, reaching 143,300 in 2024 and is projected to increase to 175,000 by 2032. Skills shortages persist, particularly in key occupations, posing a challenge to the sector's expansion.

The sector has embraced cutting-edge technologies to enhance productivity and efficiency. Remote or automated transportation systems, such as those used in the Pilbara region, exemplify this trend, enabling remote management of mining operations and fostering workforce diversity.

Efforts are being made to attract and support a more diverse workforce, including via increased female participation. Challenges remain, such as a low proportion of younger workers in the sector.

The sector relies heavily on VET-based qualifications, but enrolments for relevant qualifications have declined since 2015. Addressing this decline and ensuring workforce readiness for emerging technologies are high priorities.

## Critical minerals

Australia's Critical Minerals Strategy aims to position the country as a global leader in the critical minerals sector. The strategy aims to develop diverse, resilient, and sustainable supply chains through robust international







partnerships and build Australia's sovereign capability in critical minerals. By leveraging these critical minerals, Australia seeks to become a renewable energy superpower, extracting more value onshore. This approach not only boosts job creation and economic opportunities but also benefits regional and First Nations communities. Delivering on the Critical Minerals Strategy objectives will require addressing skills shortages, identifying skills gaps and investing in training.

## Non-metallic mineral mining and quarrying

Australia's non-metallic mineral mining and quarrying industry plays a crucial role in supplying raw materials for the construction sector.

With nearly 1,900 quarries across Australia, this sector supplies construction materials like stone, sand, gravel, limestone, and gypsum. Most quarries in Australia are small operations. The demand for roles in this industry is closely tied to the building and construction sector, which is forecast to experience growth in the coming years. The non-metallic mineral and quarrying workforce have experienced strong growth in recent years. The workforce data captures lithium and mineral sands mining. Consequently, the workforce growth is likely linked to the expansion of lithium and mineral sands operations, particularly in Western Australia.

Like other mining sectors, the non-metallic mineral and quarrying sector faces skills shortages, with several key occupations experiencing high demand. National vacancy levels for roles such as truck drivers and drillers are above pre-COVID levels, indicating a strong rebound in the industry. The sector has more female employees than other mining sectors, at 26%. The sector faces challenges related to an ageing workforce, with a median age of 45 and a higher proportion approaching retirement than entering the industry.

## Oil and Gas Extraction

The Oil and Gas Extraction industry is a significant economic contributor to Australia. The industry was valued at \$130 billion in 2023, with gas accounting for 87% of this value. The industry has grown from primarily serving domestic demand in the 1980s to becoming the world's second-largest exporter of Liquefied Natural Gas (LNG) by 2022.

The industry is vertically integrated and encompasses exploration, extraction, refining, and transportation. Offshore extraction mainly occurs off Western Australia and in the Bass Strait, while coal seam gas (CSG) is predominantly extracted in Queensland and New South Wales.

The workforce has declined from 32,600 in 2018 to 17,600 in 2024 but is projected to rebound to 29,700 by 2033. Skills shortages are prevalent, with many required occupations overlapping with the broader mining industry.

Western Australia has the largest workforce share (44%), followed by Queensland (31%). The industry has a low female representation (18%) and an older workforce, with a median age of 42. A significant portion (47%) of the workforce requires at least a bachelor's degree, reflecting the specialised skills needed.

## Exploration and other mining support services

The exploration and other mining support services sector in Australia is fundamental to the success of the mining industry and the economy. Mineral exploration is essential for discovering and unlocking Australia's mineral wealth. Skilled geoscientists and exploration professionals play a vital role in this process, contributing to the long-term success of the mining industry and the economy.

Much of the workforce is in Western Australia, followed by Queensland and South Australia. The sector has a diverse workforce, with 21% representation of women and a reliance on higher education qualifications and vocational training.

The exploration and mining support services workforce has been steadily expanding, with a projected 8% growth by 2033. The sector faces challenges related to skills shortages, particularly in highly specialised roles such as geologists, geophysicists, and hydrogeologists.

Occupations within the exploration drilling sector offer unique opportunities for workers seeking variety, high pay, and manual labour. The sector experiences higher staff turnover rates due to harsh working conditions, transiency, and the cyclical nature of commodity pricing.

## Mining industry trends and priorities

The mining industry in Australia faces several challenges and priorities that need to be addressed to ensure its continued success and positive impact on the economy.

Every mining industry sector is experiencing skills shortages, especially in the top 11 to 20 occupations by employee numbers, [Figure 1](#). Attracting and retaining new workers is crucial for the industry's growth, but recruitment difficulties persist, with 52% of employers reporting challenges in filling roles. Despite increased demand, engineering and earth sciences-related degree enrolments have been declining. Initiatives like degree apprenticeships could help attract and retain students in specialised fields like mining engineering and geology.

The mining industry's image is influenced by changing societal expectations, environmental concerns, and incidents like the destruction of sacred



Indigenous sites. Efforts to improve a range of perceptions, especially among younger generations, are crucial for attracting talent to the industry. Unlike previous generations, Generation Z is the first to prioritise workplace flexibility and purpose over remuneration when choosing a career path or industry, meaning the mining industry will need to do more than just offer high wages to attract talent.

The industry has seen increased female representation but still lags in gender pay equality and female enrolment in relevant qualifications. Addressing these gaps and promoting diversity and inclusion are essential for a sustainable workforce. High drop-off rates in apprenticeships and traineeships pose challenges for the industry. To reverse this, improving mentoring and coaching, addressing trainer shortages, and supporting apprentices are priorities. Migration plays a vital role in filling skills gaps, but barriers like housing shortages and global competition hinder its effectiveness. Addressing these challenges and streamlining skilled migration processes may well benefit the industry.

Technological advances like digitisation and automation are changing how mining work is done, creating new job opportunities and requiring higher digital skills. The mining sector is increasingly adopting advanced technologies to improve productivity and safety, including data analytics, continuous asset monitoring, robotics, and AI systems. As technology evolves, new and emerging job roles require advanced technical skills and education. Retraining and reskilling the whole workforce will be crucial in managing this transition.

The mining industry is transitioning towards more sustainable operations, including adopting electric or diesel-electric mobile plant equipment to reduce carbon emissions. While hydrogen-powered solutions are also considered, electrification presents a more efficient option for some companies, especially where infrastructure is already in place.

Mine rehabilitation and closure and oil and gas decommissioning activities are needed as mines and wells reach the end of their operational life. When closed effectively, they will contribute to the industry's environmental credentials. This requires many skills, including traditional trades, multiple engineering disciplines, environmental knowledge, and First Nations cultural awareness. Training programs tailored to this phase of a mine and wells life are essential to meet workforce needs.

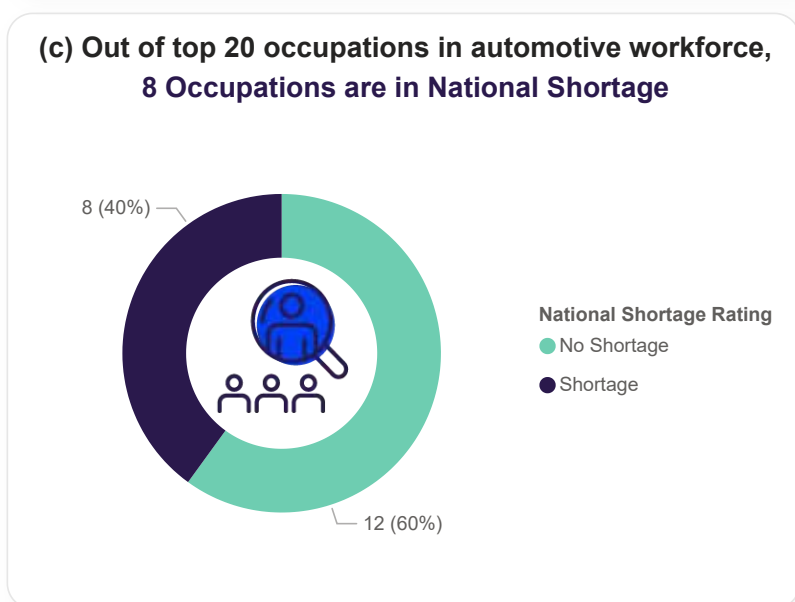
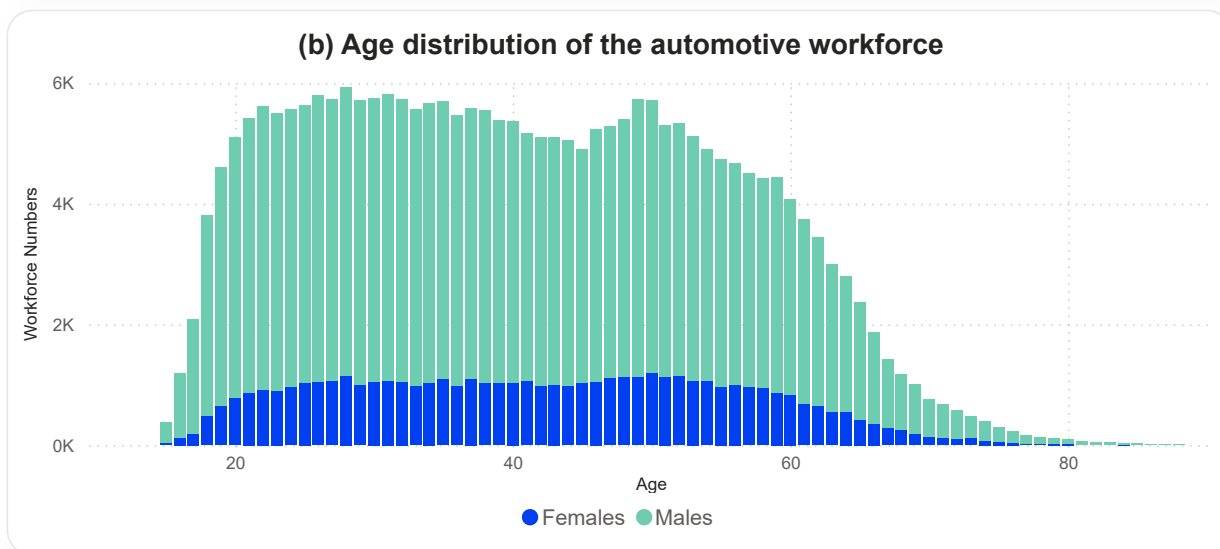
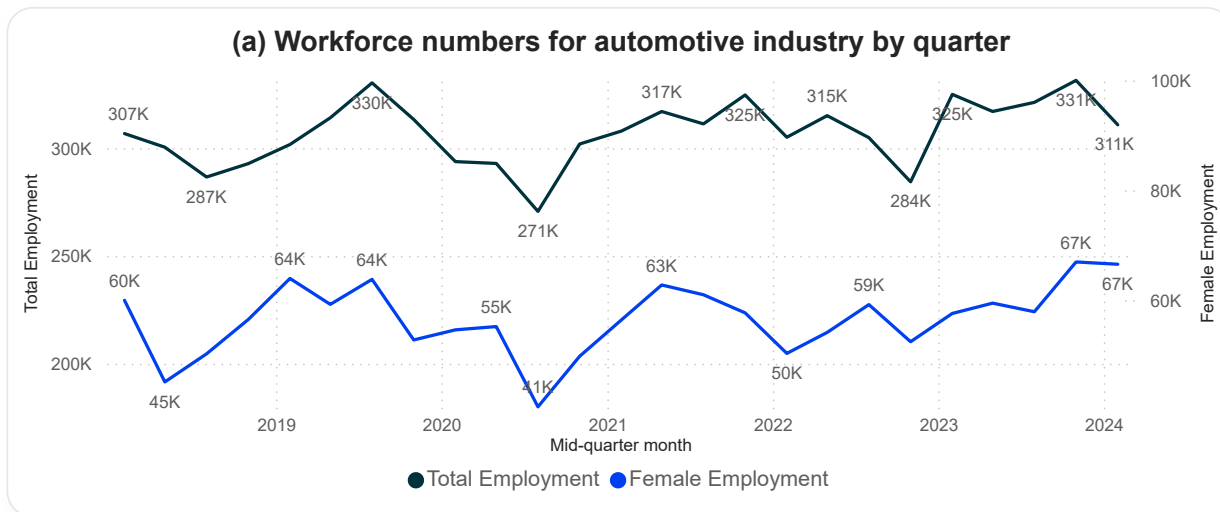
Cultural reform initiatives aim to transform workplace values and behaviours to foster safety, diversity, equity, and inclusion. Efforts to prevent sexual harassment, bullying, and racism are critical. Training programs and collaborations with government agencies and educational institutions are essential to promote cultural reform in the mining industry.

First Nations Australians play a vital role in the mining industry, and there is a growing focus on increasing their representation and involvement. Government initiatives and industry partnerships aim to create employment opportunities and ensure social and cultural accountability. Training and employment programs tailored to First Nations communities are essential for fostering participation and success.



# Automotive industry snapshot

Figure 2: Automotive Industry Snapshot Dashboard



**52%**  
of the Automotive Workforce are VET Qualified

**(d)**

Sources: (a) ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 (b) Census of Population and Housing (AGEP Age and SEXP Sex), 2021, TableBuilder (c) ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL (ANZSCO 2013) (d) Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder



## The automotive industry

Australia's automotive industry is a significant economic force, generating about \$174 billion in 2022 –23 and expected to grow to over \$185 billion annually within 5 years. The industry's revenue primarily comes from imported vehicle sales and a robust domestic market for parts and accessories. Transitioning from traditional vehicle manufacturing, the industry now focuses on specialised production such as high-tech engineering and component manufacturing, maintaining its relevance in the global market despite the end of large-scale car manufacturing in 2017.

The industry, employing over 320,200 workers (four-quarter average from May 2023 to February 2024), is evolving with a steady shift towards electric vehicles (EVs) and advanced technologies, aligning with global sustainability goals and responding to consumer demand for innovative transport solutions. 2023 saw record vehicle sales, boosted by increased sales of EVs and hybrids. This growth in demand is reflected in the projected workforce growth of over 31,000 more workers by 2033.<sup>3</sup>

Challenges like skill shortages and the need for continual technological adaptation are prevalent, yet there are opportunities for growth in the EV and hydrogen technology sectors. Significant enrolments in vocational education and training support the demand for skilled workers, while also emphasising the necessity of aligning workforce skills with technological advancements in the automotive field.

### Automotive retail and wholesale sector

The automotive retail and wholesale sector<sup>4</sup> in Australia employs over 124,000 individuals. It encompasses a broad range of activities including selling vehicles, trucks, buses, motorcycles, bicycles, and related parts and accessories. The sector is well-represented nationwide, aligning with population distributions and offering employment opportunities in urban and remote areas. The sector includes over 3,575 car dealerships, 697 motorcycle dealerships, 532 caravan and trailer dealerships, and approximately 1,000 bicycle retailers. These establishments often cluster in metropolitan areas, creating hubs that spur local employment and support services like parts and tyre shops.

Licensing requirements for vehicle salespersons vary by state. They involve

<sup>3</sup> Jobs and Skills Australia. *'Employment Projections'*. 2023.

<sup>4</sup> NOTE: While AUSMASA is providing data and a narrative on the automotive wholesaling sector as part of its 2024 Workforce Plan, it should be noted that this sector is officially the responsibility of the Service and Creative Skills Australia (SaCSA) Jobs and Skills Council. The automotive wholesaling sector is expected to become officially part of AUSMASA's responsibility prior to the 2025 Workforce Plan.

some training but do not necessarily culminate in a formal qualification. The AUR31020 Certificate III in Automotive Sales offers a more structured educational pathway, often pursued through traineeships.

Despite a stable workforce size over the past 5 years, the workforce is projected to grow modestly to 133,600 workers within the next 9 years due to changing consumer behaviours, such as the increased reliance on online vehicle reviews and purchasing. The sector is gradually shifting from traditional sales roles to more digital and service-oriented roles due to the growing trend of online vehicle customisation and purchase, particularly with EV brands like Tesla and BYD leading this change.

The workforce is relatively young, with a significant portion under 26, and shows a higher female participation rate than other industry sectors. Educational levels vary, with many holding secondary education qualifications or completing vocational training in automotive sales.

## Automotive repair and maintenance sector

The automotive repair and maintenance sector is a crucial part of Australia's automotive industry, employing 158,500 workers across various specialties such as auto electrics, mechanical servicing, and body repairs. This sector, which includes over 27,70 service and repair workshops, has seen an 11.5% increase since 2021, indicative of the growing vehicle numbers and demand for maintenance services.

Most of these workshops are independently operated, with a significant portion being small businesses, indicating a diverse and decentralised industry structure. The sector faces a persistent challenge of skills shortages, with critical roles like motor mechanics, panel beaters, and vehicle painters in high demand but low supply. This shortage is compounded by the sector's struggle to attract new workers due to relatively low wages compared to other trades.

The sector is also seeing a shift in how services are provided, largely due to the increasing number of vehicles and advancements in autonomous vehicle systems and automotive technology. This includes the rise of electric and hybrid vehicles, which require new skills and training programs to ensure technicians are prepared for the evolving landscape of automotive technology.

The sector is involved in discussions about future requirements for servicing EVs, including the role of licensing for EV technicians. There is also a focus on recycling and end-of-life management for EV batteries, highlighting the need for new skills and training.





## Automotive manufacturing sector

Transitioning from passenger vehicle manufacturing, the industry now thrives on producing caravans, camper trailers, trucks, buses, motor vehicle bodies, trailers and specialised production such as high-tech engineering and component manufacturing, maintaining its relevance in the global market despite the end of large-scale car manufacturing in 2017. In 2022–23, more than 3,000 businesses generated over \$14 billion revenue. The sector thrives primarily on producing caravans and camper trailers, which contribute \$3 billion, along with trucks, motor vehicle bodies, trailers and buses.

The workforce, currently stable at approximately 41,500 employees, is anticipated to grow to 50,000+ within the next 9 years, driven by demand for specialised manufacturing skills, particularly in areas facing skill shortages such as structural steel, welding, and engineering. The sector is predominantly concentrated in Victoria showing stronger female representation than other automotive sectors, with a significant portion of the workforce holding VET or higher education qualifications.

Significant growth is seen in innovative areas such as EV technology, with companies like Zero Automotive and Exro Technologies leading in EV conversions, indicating a shift towards more sustainable manufacturing practices and a potential increased local manufacturing of EV components. This evolution underscores the sector's ongoing adaptation and the critical role of vocational training to meet emerging technological demands.

## Automotive industry trends and priorities

The automotive industry in Australia is grappling with poor public perceptions portraying it as dirty and unsophisticated, despite significant technological advancements and a shift towards high-tech roles, particularly in electric and hybrid vehicle technologies. While general satisfaction among automotive apprentices is high, the challenge remains in attracting new entrants, particularly women and under-represented groups. Increasing female and underrepresented group participation, the industry can tap into a broader talent pool, addressing the current skill gaps. Fostering an inclusive environment can lead to diverse perspectives and innovative solutions, further strengthening the industry's capacity to meet its demands.

Efforts are underway to improve diversity and inclusion within the industry, with initiatives like Women in Automotive and programs to increase First Nations participation. These efforts are crucial for filling labour shortages and fostering a more inclusive industry culture.

Skilled migration could help address skills shortages. The industry faces challenges with skilled migration – such as the skill level of the workforce requirements not meeting skilled migration requirements, administrative obstacles, and high costs associated with skill recognition – noting the Government seeks to address some of these issues as part of its Migration Strategy.

# Introduction

## About the Mining and Automotive Skills Alliance

A key role of AUSMASA, the JSC for the Australian mining and automotive industries, is to identify current and future workforce requirements, and consider those of allied sectors. This understanding forms the foundation of how we support both industries in ensuring the VET system is, and individual training packages are, responsive and tailored to their workforce skilling needs.

AUSMASA aims to empower both industries to develop essential workforce capabilities that are not only relevant for the present but adaptable to the future. Recognising the rapidly evolving nature of both sectors, AUSMASA acknowledges the need for a responsive VET system as a key contributor to this aim. AUSMASA notes that while it is the custodian of several vital VET training packages related to the mining and automotive industries, solutions to current and emerging industry needs will also require holistic input and support from the broader education sector. This includes non-accredited, school-based, and university-based programs, as well as other stakeholders, including governments, industry peak bodies, unions, registered training organisations (RTOs), and State Training Authorities (STAs). By working closely with industry leaders, educational institutions, and key stakeholders, AUSMASA will help pave the way for a skilled and resilient workforce capable of meeting the challenges of today and tomorrow.

Another vital function of AUSMASA is industry stewardship. By gathering valuable insights into workforce issues, and advising on policies for the national training system, AUSMASA acts as a key voice for the mining and automotive industries that informs both the design and development of training packages and future policy development by the Australian Government. Our stewardship role emphasises the importance of promoting cooperation between training providers and industry in shaping a VET sector that effectively meets the needs of learners and employers alike.





## Industry coverage

AUSMASA's coverage of the mining and automotive industries includes various sectors and segments in ANZSIC. While the mining industry is recognised in an entire division of ANZSIC (Division B), the automotive industry is recognised as a consolidation of industry classes across the following 4 different divisions: manufacturing, retail trade, wholesale trade, and other services.

[Figure 3](#) diagrammatically shows AUSMASA's ANZSIC-based industry coverage. [Figure 3](#) sets out the backbone of how AUSMASA approached its data and research analysis for this workforce plan and shows a combined Australian mining and automotive workforce of roughly 632,700 workers, comprised of 312,500 for mining and 320,200<sup>5</sup> for automotive.

Throughout this workforce plan, each of the 8 identified sub-industries (5 within mining and 3 within automotive) are explored individually, with key drivers for these sub-industries explored. Where there are trends, drivers, challenges, and opportunities that affect multiple sub-industries, these are explored at the industry-wide level as appropriate.

This workforce plan draws on a large pool of government and industry-sourced data. [Appendix H](#) provides an overview of the methodology that has been applied to the collection and interpretation of various data sources.

As part of its role as a JSC, AUSMASA is the custodian of the following VET training packages:

**AUM: Automotive Manufacturing**

**AUR: Automotive Retail, Service and Repair**

**RII: Resources and Infrastructure (mining), excluding civil construction**

*Australia's mining and automotive workforce has approximately **632,700** workers combined, with mining **312,500** and automotive at **320,200***  
*(four-quarter average from May 2023 to february 2024)*

[Appendix I](#) Lists 2022 enrolment and completion data for qualifications under AUSMASA's control.

<sup>5</sup> Where industry workforce figures are cited in the workforce plan, they are a four-quarter average from May 2023 to February 2024

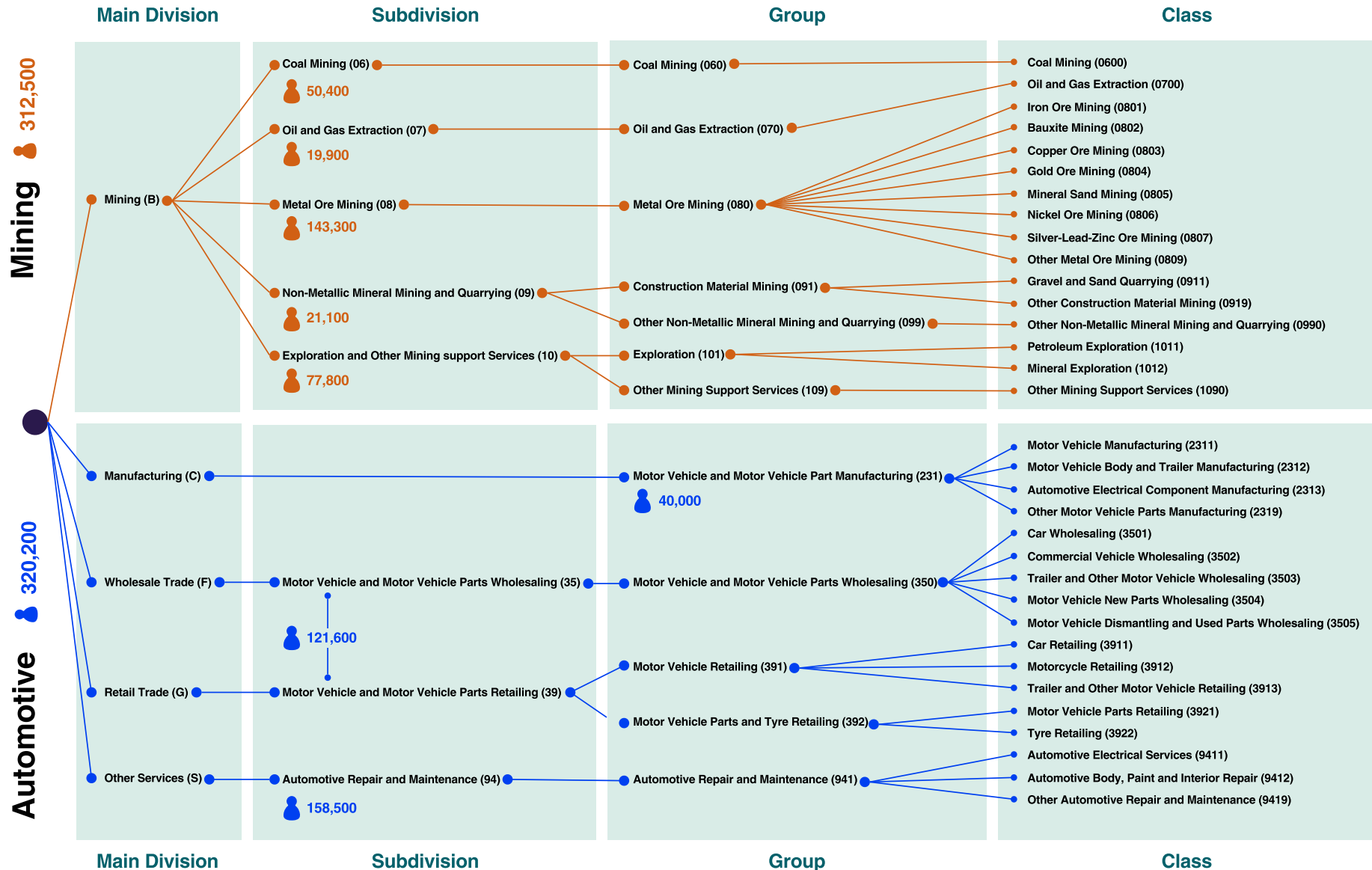


Figure 3: AUSMASA's Workforce Plan Backbone

## 2023 highlights

Throughout 2023, AUSMASA focused on establishing itself as a new JSC, developing internal capabilities, constituting advisory panels, and creating broad-ranging stakeholder engagements to inform its activities. Three key deliverables throughout this phase are detailed below.

### Initial Workforce Plan – *The Future is Now*

Completed in early October, and published in November, AUSMASA's Initial Workforce Plan – *The Future is Now* – provided an important high-level data-driven overview of the mining and automotive industries, which subsequent annual workforce plans will continue to build on.

The initial workforce plan created the methodology for defining the industries that AUSMASA has responsibility for, using the ANZSIC framework. This saw the creation of AUSMASA's workforce planning backbone, [Figure 3](#).

In addition to establishing key demographical insights for both industries, the initial workforce plan introduced key trends, challenges and opportunities that impact the workforce needs of today and the future.

The 2024 Workforce Plan builds on the foundations set by the initial workforce plan and adds greater sub-industry data granularity coupled with deeper insights into the issues affecting both industries.

### Strategic Workforce Advisory Panels (SWAPs)

Strategic Workforce Advisory Panels (SWAPs) are a key tripartite element in AUSMASA's industry engagement strategy. Officially launched in late 2023, 2 SWAPs, one for the mining industry and one for the automotive industry, bring together a diverse range of stakeholders passionate about assisting AUSMASA in identifying ways of supporting their respective industries via impactful projects and stewardship activities.

Each SWAP consists of 15 members, comprising employers, peak bodies, unions, representatives from Technical and Further Education colleges (TAFEs) and Registered Training Organisation (RTOs), and industry thought leaders. Meeting quarterly, SWAPs provide an important consensus-led endorsement



function for proposed projects and bring industry views and insights directly to AUSMASA's attention. The composition of both SWAPs is provided in [Appendix D](#).

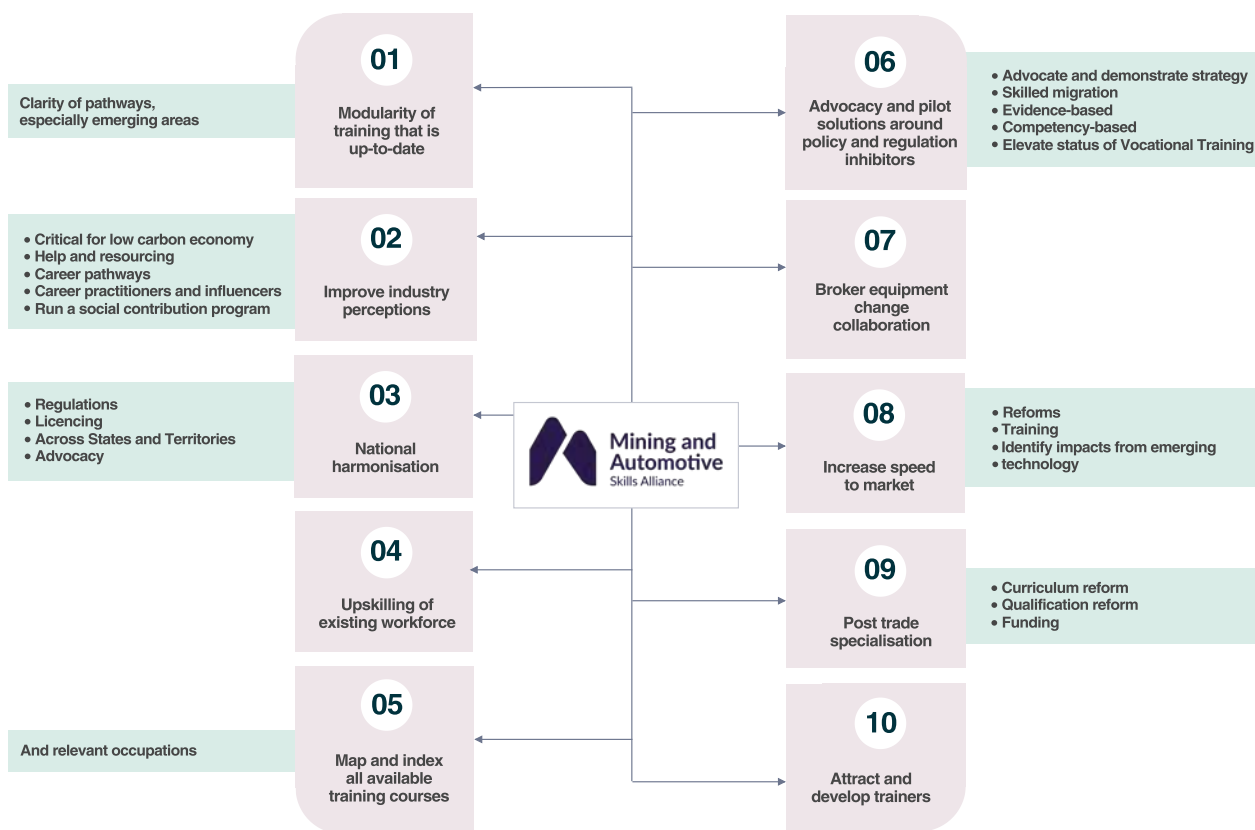
## Critical Minerals and Electric Vehicle Skills Forum

Critical Minerals and Electric Vehicle Skills Forum, the Australian mining and automotive industries are both advancing toward a decarbonised future. This shared journey intersects strongly when considering the importance that critical minerals play in supporting the expansion of EV manufacturing, sales and support.

In recognition of this relationship between both industries, AUSMASA convened a Critical Minerals and Electric Vehicle (CMEV) Skills Forum in Canberra on 26 October 2023. Bringing together 80 industry, government and educational leaders from both industries, the forum was an opportunity to explore the key priorities that AUSMASA could influence.

Extensive workshopping throughout the day led to the establishment of a 10-point Strategic Plan focussing on the common issues and priorities for both industries in relation to critical minerals and EVs. [Figure 4](#) identifies the 10 priorities that came from the CMEV Skills Forum. AUSMASA will continue to work closely with industry and government to progress these priorities, identifying key recommendations and projects aligned to these throughout this workforce plan where appropriate.

Figure 4: CMEV – 10-Point Strategic Plan



CMEV 10-Point Strategic Plan Plan Map



## Current projects and priorities

As part of its establishment phase and in response to identified industry priorities, AUSMASA presented 5 projects to the Department of Employment and Workplace Relations (DEWR) for funding consideration via its initial Annual Activity Schedule (AAS) submission. Activity funding is provided to JSCs to undertake agreed activities to carry out training product development and implementation, promotion, and monitoring functions.

The data analysis and industry insights from the Initial Workforce Plan identified several potential priority opportunities for further consideration. Below is an update on current AAS projects and progress against identified opportunities.

### Current projects

#### 1. Resource Development: Certificate II in Autonomous Workplace Operations

Building on existing content developed for *R1121222 Certificate II in Autonomous Workplace Operations*, this project will augment the resources to suit the learning needs of students undertaking training through a VET Delivery to Secondary Students (VETDSS) pathway. Content will be developed through a collaboration between subject matter experts from training providers currently delivering similar training content in Western Australia and made available under creative commons to a national RTO network.

The project has 2 high-level aims:

- To assist those training providers in Western Australia that are currently delivering state-based courses in autonomous operations, transition to deliver the *R1121222* qualification in early 2024.
- To promote and support RTOs nationally to take up delivery of *R1121222* Certificate II in Autonomous Workplace Operations by making freely available the outputs of this project.

#### 2. Review and update of the RII emergency response qualifications

This project will undertake a comprehensive review of the Emergency Response qualifications, skill sets and units of competency in the RII Resources and Infrastructure Industry Training Package. The review will explore training product feedback from industry and training providers, which indicated a need for the qualifications to be revised for currency and for a review of the training package rules for each qualification. An initial national consultation process will capture the views of as many stakeholders as possible, with an interest in the qualifications. Following

this consultation, the project will propose a strategy to redevelop the qualifications and units of competency, to ensure they meet current and emerging needs of the sector.

Given that some units of competency to be reviewed are used in other training packages, the strategy will consider the impact of any proposed changes on other workforces that use the units of competency. The project will focus on the following Emergency Response qualifications and training products within the RII Training Package:

- RII30719 Certificate III in Emergency Response and Rescue
- RII41319 Certificate IV in Emergency Response Coordination
- RIISS00033 Underground Coal Mine Safety Skill Set
- RIISS00034 Surface Coal Mine Safety Skill Set

### **3. Training package review of superseded units of competency**

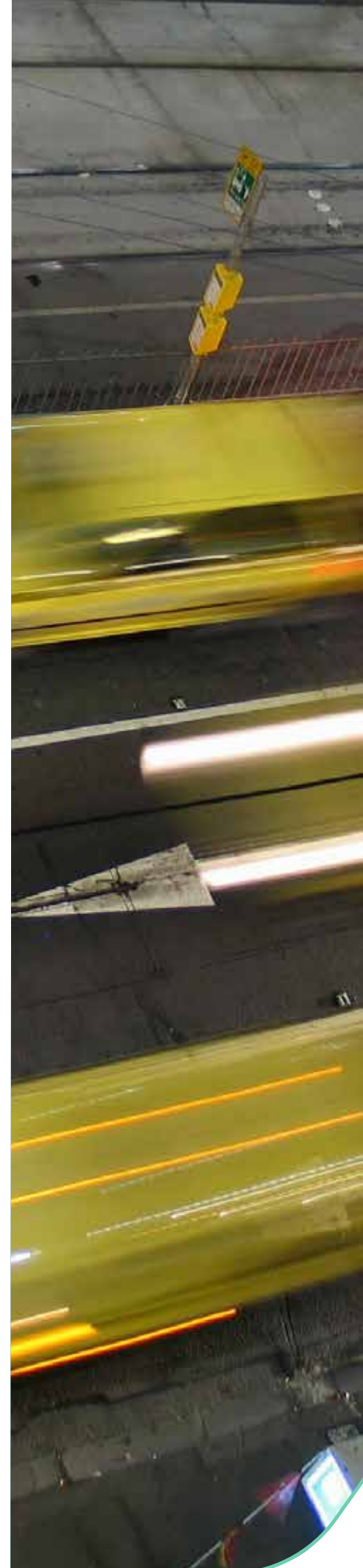
This project will undertake a desktop review and audit of all qualifications across the Automotive Manufacturing (AUM), Automotive Retail, Service and Repair (AUR) and the Resources and Infrastructure (RII) (mining) training packages to identify the extent to which superseded units of competency are listed in current qualifications and skill sets. Having determined the extent of qualifications listing outdated units of competency, the project would embark on a period of consultation with stakeholders to propose updating those qualifications with the relevant current unit of competency in place of the superseded units.

A key deliverable will be a report specifying the qualifications that contain superseded units of competency, the code and title of the superseded units, the relevant new unit of competency for each superseded unit and whether the new unit is equivalent or non-equivalent.

### **4. Review into VET training products with low and no enrolments**

An initial analysis of enrolments at a qualification level, using National Centre for Vocational Education Research (NCVER) data, has identified that across the AUM, AUR and RII (mining) training packages, several qualifications have less than 50 enrolments per year nationally. The reasons underpinning low enrolments are not clear from this initial analysis.

This project will undertake a desktop review of enrolment data to identify training products with low or no enrolments over the previous 5 years. The products within the scope of work are those within the AUM, AUR, and RII (mining) training packages.





## 5. Market research into youth perceptions of automotive careers

The project aims to attract young people from diverse backgrounds to various automotive occupations. To achieve this, a research project will be conducted to understand the perceptions of young people regarding the automotive sector and associated careers. In particular:

- the perceptions of young people and women on careers in the automotive sector
- the perceptions of existing apprentice mechanics to see if they intend to stay in the industry given the transition to EVs.

The findings would be used to inform AUSMASA, employers, and education and training providers to help develop strategies for attracting and retaining school leavers into the industry and education pathways.

## 6. Skills mapping (current and future state)

This project was first flagged as priority opportunity #5 in AUSMASA's Initial Workforce Plan and seeks to identify the key skills required by priority occupations within the mining and automotive industries, with a lens on both current needs and those that may be required in the near future due to changes in both industries.

This project will work closely with industry to ensure the skills identified are industry-verified and that the drivers of change in relation to future skills needs are also correctly identified and captured.

AUSMASA will use the current and future-state skills maps to conduct a gap analysis against current qualifications and inform the potential development of new VET training packages.

If this project is successful, it could be repeated in additional roles within both industries. It is envisaged that this project will be completed by the end of 2024.

## 7. Career pathway mapping

AUSMASA's Initial Workforce Plan identified a career pathway map as a key priority opportunity (Opportunity #9). This project will explore the career pathways taken by people in the same occupations as identified in the Skills Mapping project.

The project will explore what education programs, both accredited and non-accredited, were used to support entry into, and progression through, the relevant industry and what barriers, if any, impacted individual's career progression.

AUSMASA notes that Jobs and Skills Australia (JSA) is currently undertaking work around Higher Education Routes to Occupations (HERO) and Training Occupations Pathways (TOP). AUSMASA will incorporate the findings of this research into this project with the view of providing additional industry-specific insights, including non-accredited training programs and the roles they play in supporting skills development and career progression.

The ability to understand the actual career journeys of industry participants, and how they interacted with the education sector will inform AUSMASA of opportunities to support careers in the mining and automotive industries through more relevant and targeted qualifications.

### 8. Qualification Reform Design Group - Categorisation Project

In support of the Qualification Reform Design Group's proposed new differentiated qualifications system, AUSMASA will undertake a purpose categorisation activity. Working with the Design Group and states and territories, AUSMASA will road-test the proposed approach on the AUM and AUR training packages. The proposed new system moves from a 'one size fits all' approach to designing qualifications based on their purposes:

- **Purpose 1** – qualifications leading to a specific occupation (for example, a licensed trade).
- **Purpose 2** – qualifications to prepare learners for multiple occupations within an industry.
- **Purpose 3** – qualifications that develop cross-sectoral or foundation skills and knowledge which may be applied across industries, or lead to tertiary education and training pathways.

As a broad test of the model, AUSMASA will categorise qualifications into one of the 3 purposes and apply the Design Group's Qualification Development Quality Principles to simplify and rationalise qualifications where possible. The purpose of the categorisation activity is to achieve 3 main outcomes:

1. Categorise qualifications into one of the 3 purposes and provide a rationale for the determination.
2. Assess the purpose-led model, identifying strengths and opportunities for improvement.
3. Identify opportunities for reform of qualifications based on purpose category and outline potential future projects to achieve these, including a particular focus on low or zero-use training products.

This will assist in characterising the types of qualifications typical of each purpose and indicate where the VET system can be streamlined to





recognise transferable skills better, provide more opportunities for learners, and build more flexibility and responsiveness where required.

## 9. Qualification Reform Design Group – Demonstration Project

In this project, AUSMASA will work in consultation with key stakeholders to test ‘Purpose 2’ of the proposed purpose-driven, principles-based qualification model developed by the Qualification Reform Design Group across the current Certificate II qualifications in the AUR Automotive Retail, Service and Repair Training Package. This is a demonstration project designed to test the proposed qualification model and to inform advice provided by the Design Group to Skills Ministers by the end of 2024.

A Project Steering Committee (PSC) will be established to oversee and provide input into the project. Members will represent a breadth of key stakeholders with knowledge and expertise in the design and delivery of qualifications for the automotive sector and an interest in resolving key workforce challenges for the sector. Sub-committees representing state and territory authorities and RTOs will also be established to ensure a breadth of stakeholder views and needs are reflected in the final report.

## Progress against identified opportunities

AUSMASA’s Initial Workforce plan identified 12 opportunities for future priorities.

[Appendix G](#) provides an update on what progress has been made against each one.



## National economic setting - 2024

While the mining and automotive industries have unique drivers, the macroeconomic environment has a significant impact on both industries and their respective workforces. Population growth coupled with steady increases in workforce participation, particularly among women, has driven rising employment across the country with the number of Australians employed increasing by 25% in the last 10 years.<sup>6</sup> Yet productivity gains have not been supporting higher rates of economic growth and have hindered growth in real wages in many sectors.<sup>7</sup>

While unemployment remains low, the cost of living continues to be a significant challenge in Australia despite inflation declining from a peak of 7.8% in the December quarter of 2022, to 4.1% in the December quarter of 2023.<sup>8</sup> The latest outlook from the Reserve Bank of Australia expects further decreases, with the inflation rate expected to return to its target band of 2–3% in 2025.<sup>9</sup> The timing of any subsequent shift

in monetary policy remains unclear. Sustained high interest rates pose an ongoing risk to the Australian economy in the short term, with the cost-of-living pressures created by them not set to ease in the immediate future.

As highlighted in the latest Intergenerational Report released by the Department of the Treasury in 2023, Australia's long-term economic growth prospects will confront challenges stemming from an aging population and an anticipated decline in workforce participation.<sup>10</sup> Consequently, prioritising policies aimed at restoring productivity growth to historical levels becomes paramount for government and industry alike. This entails a rigorous focus on enhancing workforce skills, fostering innovation, and bolstering technology investment to safeguard the prosperity of all Australians.



*The cost of living continues to be a significant challenge in Australia*

## Population and high participation rates driving a larger workforce

Population growth has been a major driver of the Australian economy in recent years – both for its direct impact on consumption and indirect effect on workforce growth. According to the Australian Bureau of Statistics (ABS), Australia's population reached 26.7 million people by the end of June 2023, marking a notable increase of 624,100 individuals, or 2.4%, over the financial year.<sup>11</sup> This surge in population growth was primarily driven by net overseas migration, which added 518,100 individuals to Australia's population in the year ending June 2023.<sup>12</sup> Conversely, the natural population (births minus deaths), which peaked at 163,000 in 2012, increased by just 106,100 individuals in the year ending June 2023.<sup>13</sup>

Reflecting the buoyant population growth, the Australian workforce expanded significantly, setting monthly employment records throughout 2023 and culminating in a historic high of 14.2 million employed

<sup>6</sup> Australian Bureau of Statistics, January 2024 - *Labour Force, Australia*, released 15 February 2024.

<sup>7</sup> Productivity Commission, *5-Year Productivity Inquiry: Keys to Growth*, Inquiry Report Volume 2, released 7 February 2023.

<sup>8</sup> Australian Bureau of Statistics, December Quarter 2023 - *Consumer Price Index, Australia*, released 31 January 2024.

<sup>9</sup> Reserve Bank of Australia, *Statement by the Reserve Bank Board: Monetary Policy Decision*, released 6 February 2024.

<sup>10</sup> Department of the Treasury, *Intergenerational Report 2023*, released 24 August 2023.

<sup>11</sup> Australian Bureau of Statistics, June 2023 - *National, state and territory population*, released 14 December 2023.

<sup>12</sup> Australian Bureau of Statistics, 2021-22 financial year - *Overseas Migration*, released 16 December 2023.

<sup>13</sup> Australian Centre for Population, *National, state and territory population, June 2023*, released 14 December 2023

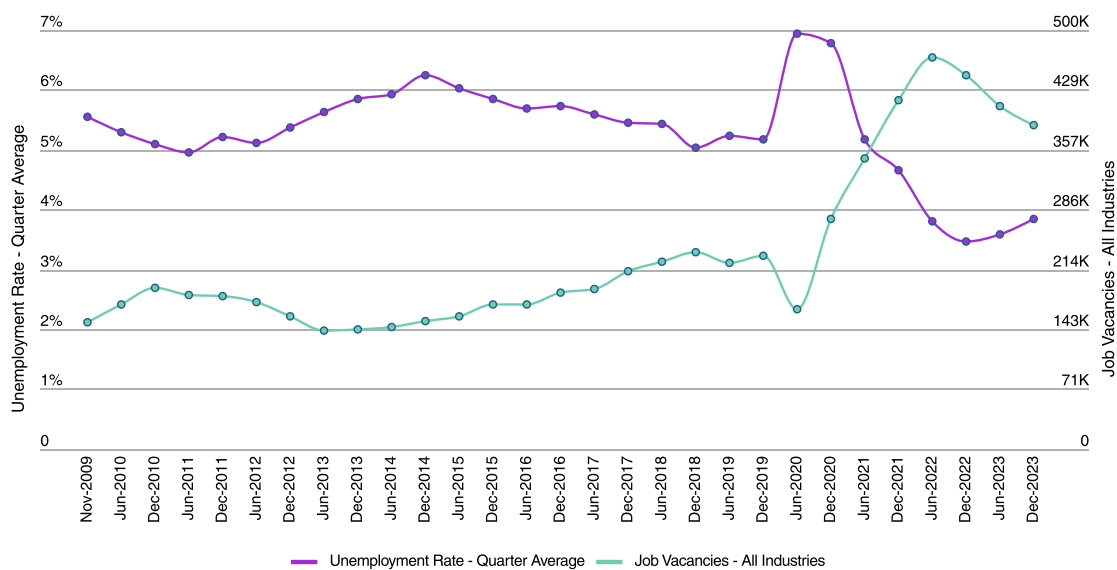
individuals in December 2023 – an increase of 418,000 individuals or 3.0% from the previous year.<sup>14</sup> Coupled with an unemployment rate of 3.8% during the same period,<sup>15</sup> Australia is arguably experiencing its most robust labour market conditions in history. Near record low unemployment and high job vacancies is an unusual combination indicating that demand for high-skilled workers remains unfilled, [Figure 5](#). Consequently, nominal wage growth rebounded, with the wage price index witnessing a 3.6% increase in 2022–23, the highest in over a decade, [Figure 6](#).<sup>16</sup>

14 Australian Bureau of Statistics, January 2024 - *Labour Force, Australia*, released 15 February 2024.

15 Australian Bureau of Statistics January 2024 - *Labour Force, Australia*, released 15 February 2024.

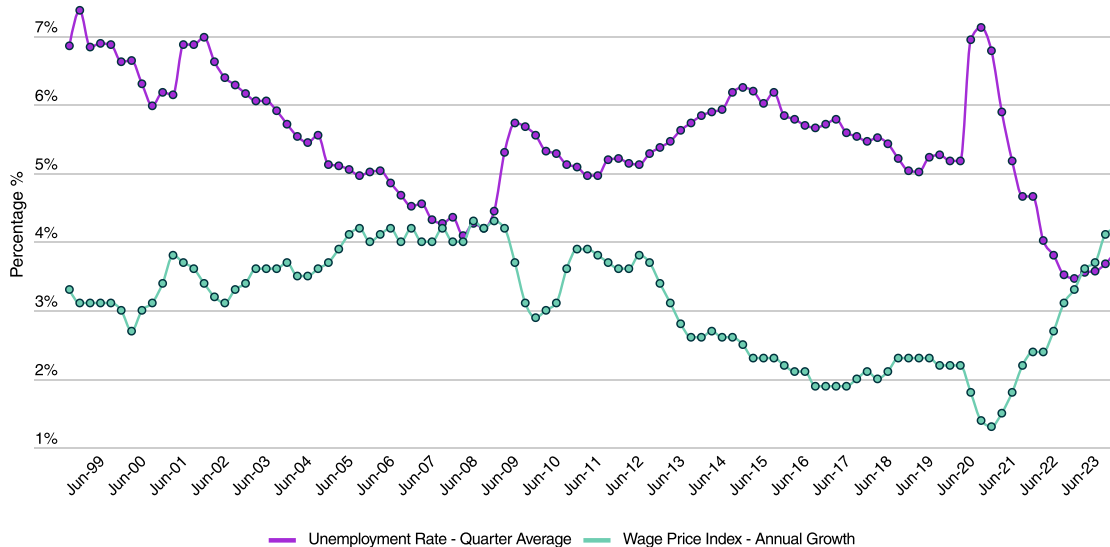
16 Australian Bureau of Statistics, December 2023 - *Wage Price Index, Australia*, released 21 February 2024.

**Figure 5: Unemployment Rate and Job Vacancies in Australia**



Source: Australian Bureau of Statistics, January 2024 - *Labour Force, Australia* (Seasonally Adjusted); November 2023 - *Job Vacancies, Australia* (Seasonally adjusted)

**Figure 6: Unemployment rate driving wage growth in Australia**



Source: Australian Bureau of Statistics, January 2024 - *Labour Force, Australia* (Seasonally Adjusted); December 2023 - *Wage Price Index, Australia* (Seasonally adjusted)

Employment growth has been concentrated primarily in key industries such as construction, healthcare and social assistance, resulting in persistent skills shortages and high demand for workers across various sectors. While the number of job vacancies nationwide declined from its peak of 475,000 in August 2022 to 386,000 in November 2023, the latter figure remains nearly double the pre-COVID levels.<sup>17</sup>

A steady rise in the participation rate has been a key driver of the long-term growth in Australia's workforce. The overall participation rate has increased from 61% in 1979–80 to 67% in 2022–23.<sup>10F</sup> As can be seen in [Figure 7](#), there has been a diverging trend in the participation rates of males and females, with strong growth in female workforce participation more than offsetting declining male workforce participation over the last 40 years.

Both trends represent a significant opportunity for Australia. Supporting the continued rise in female participation and reversing some of the losses in male participation rates can boost workforce growth and solve many skills shortages key sectors in the economy face. Increasing workforce diversity is an opportunity for the mining and automotive industries, discussed in greater detail within this report.

## Declining productivity has been the handbrake on further economic gains

Population and participation are important components of a national economic growth model, but productivity is the ultimate driver of national prosperity. Increases in labour productivity are often regarded as an indicator of improvements in aggregate living standards, as either more output (and total income) is achieved with given labour, or a given amount of output (and total income) is achieved with less time spent on labour.<sup>18</sup> Australia, like many Organisations for Economic Co-operation and Development (OECD) nations, has experienced an economy-wide deterioration in labour productivity in recent decades,<sup>19</sup> with the recent surge in employment and business investment yet to shift the dial.

*GDP per hour worked fell 3.3% in  
2022–23 – the worst decline in labour  
productivity recorded for Australia*

Analysing GDP per hour worked as an indicator of economy-wide productivity, as provided by the ABS, shows there has been a marked fall in productivity in Australia. Through the 1990s, productivity averaged 2.2% compared to just 1.2% in the ten years to 2019–20.<sup>20</sup> The situation has since deteriorated even further. Despite record employment growth and non-mining business investment in the post-pandemic recovery, GDP per hour worked fell 3.3% in 2022–23 – the worst decline in labour productivity recorded for Australia, [Figure 8](#).

## The long-term outlook

Australia is not immune from many of the trends shaping the global economy. While our economic growth rates are high compared to other advanced economies, they have been trending lower over the long term.

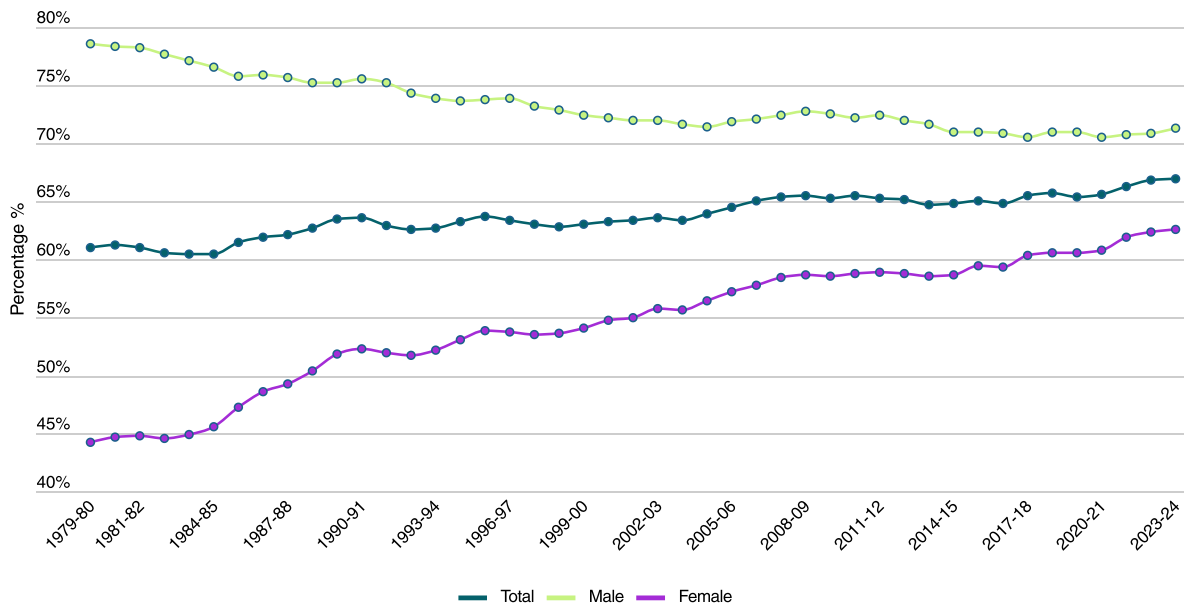
<sup>17</sup> Australian Bureau of Statistics, November 2023 - *Job Vacancies, Australia*, released 10 January 2024.

<sup>18</sup> Australian Bureau of Statistics, *Labour productivity*, 2021

<sup>19</sup> OECD, *Labour productivity forecast*.

<sup>20</sup> AUSMASA calculations based on Australian Bureau of Statistics, *2022-23 financial year - Australian System of National Accounts*, Table 15

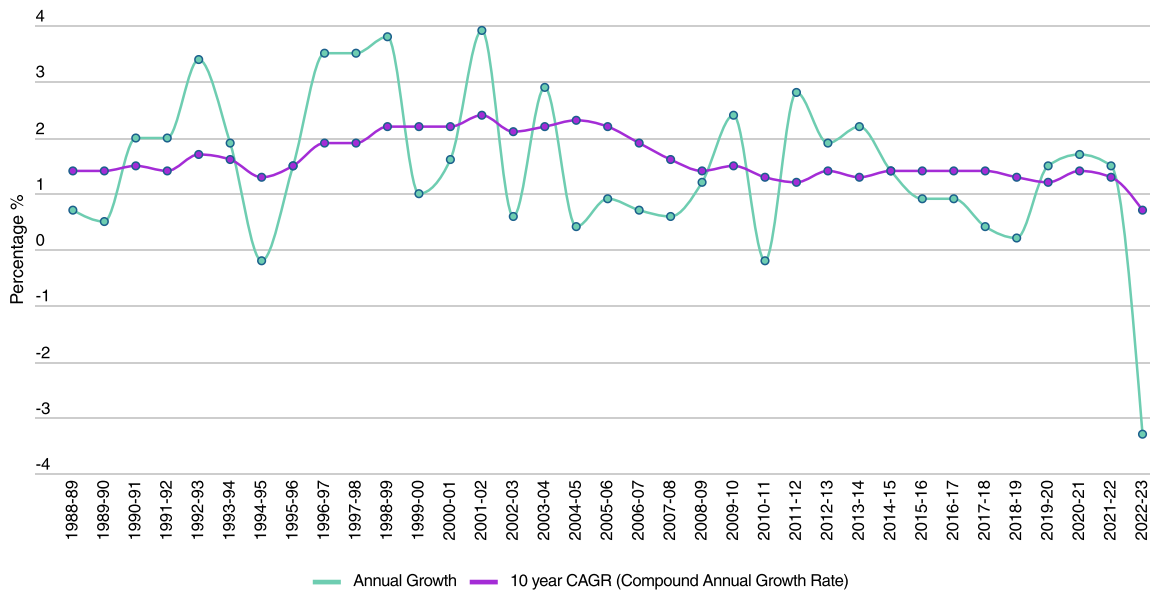
**Figure 7: Workforce participation trends in Australia**



Source: Australian Bureau of Statistics, January 2024 - Labour Force, Australia (Participation rate, Australia, Seasonally Adjusted).

As outlined in its *Intergenerational Report 2023*, the Department of the Treasury does not expect this trend to reverse, noting that “the economy is projected to grow by an average of 2.2% per year in real terms over the next 40 years compared to 3.1% over the past 40 years”.<sup>21</sup>

**Figure 8: Productivity growth in Australia (GDP per hour worked), 2022 – 2023 financial year**



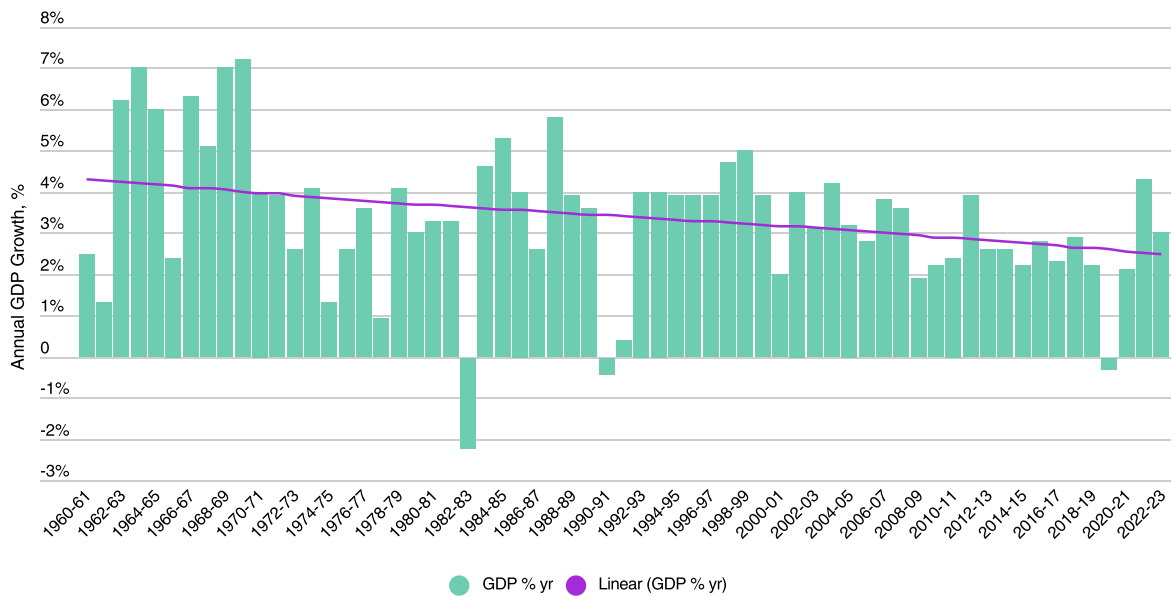
Source: Australian Bureau of Statistics, 2022-23 financial year - Australian System of National Accounts (Original).

Growing at these expected lower rates, the Australian economy (as measured by GDP) is still projected to grow around two and a half times bigger by 2062–63, with real incomes 50% higher than today.<sup>22</sup>

21 Commonwealth of Australia, *Intergenerational Report 2023*, released 24 August 2023, p.vii.

22 Commonwealth of Australia, *Intergenerational Report 2023*, released 24 August 2023, p.vii.

**Figure 9: Australia's annual GDP growth, 2022 – 2023 financial year**



Source: Australian Bureau of Statistics, 2022-23 financial year - Australian System of National Accounts (Original).

The economic analysis from the Intergenerational Report clearly shows that the rising participation rate that has bolstered Australia’s economy will no longer drive better outcomes. Due to an aging population, the participation rate is expected to gradually decline from 66.6 percent in 2022–23 to 63.8 percent by 2062–63.<sup>23</sup>

Productivity must take on a greater role in driving Australia’s future economic gains. As noted by the Centre for International Economics, a sustained 1% lift in productivity by 2030 would deliver a \$200 billion boost to the Australian economy, a 9.4% increase in real wages and make Australian families \$11,700 per annum better off.<sup>24</sup> A more skilled workforce, innovative technology and sustained increases in capital investment is critical to delivering the productivity agenda needed to achieve these results.

Against this backdrop of opportunities and challenges, the mining and automotive industries continue to operate, adding value, career opportunities, and critical goods and services for the Australian community.

<sup>23</sup> Commonwealth of Australia, *Intergenerational Report 2023*, released 24 August 2023, p.vii.

<sup>24</sup> Centre for International Economics, *Estimating the economic benefits of mining expansion and further productivity reforms*, a report for the Minerals Council of Australia, released May 2021.



# Mining Industry

Workforce Plan 2024



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## Acknowledgement of Country

In delivering our 2024 Workforce Plan we acknowledge the Traditional Custodians of the lands on which we live and work.

We acknowledge Traditional Custodians of Country throughout Australia and their connections to land, sea and community.



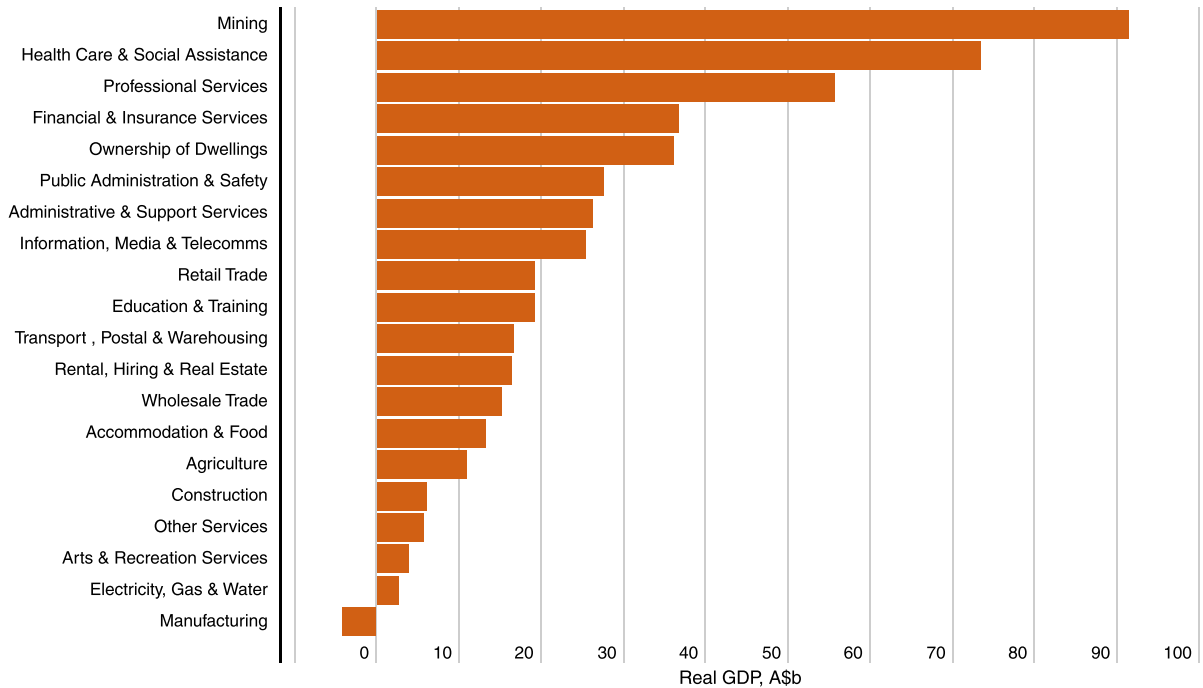
# Mining industry overview

The mining boom of the 21<sup>st</sup> century has significantly redefined Australia’s industrial landscape. In response to the rapidly rising demand for industrial and energy commodities in emerging nations over the last 20 years, Australia’s mineral and energy commodity production has surged. Proximity to emerging markets and favourable geology have played their part, but the success of the Australian mining industry goes much deeper than this. Its competitive advantage over rival mineral-rich nations has been built through the development of a highly skilled workforce, investment in innovative technologies and a stable policy environment.

The mining industry workforce has more than tripled in size in the 20 years since the start of the mining boom which, combined with over \$380 billion of capital investment since 2008, have led to significant increases in mining output.<sup>25,26</sup> Today, Australia is the world’s largest source of iron ore, bauxite, and lithium; the second largest gold producer; and a key source of critical minerals, coal and industrial commodities. With 348 operating mines producing 19 different mineral commodities, Australia is widely recognised as a world leader in mining production, technology, and sustainability.<sup>27</sup>

The effect of the mining boom on the broader Australian economy has been profound. Mining has been the largest source of economic growth in the last decade, and in 2022–23 directly provided 13.3% of Australia’s GDP – while employing only 2% of Australia’s workforce.<sup>28,29</sup>

**Figure 10: Contribution to GDP growth by industry, 2012-13 to 2022-23**



Source: Australian Bureau of Statistics, Australian System of National Accounts, released 27 October 2023

25 Australian Bureau of Statistics, *Labour Force, Australia*, released 15 February 2024.  
 26 Australian Bureau of Statistics, *Private New Capital Expenditure and Expected Expenditure, Australia*, released 29 February 2024.  
 27 Geoscience Australia, *Australian mineral facts*, released 11 September 2023.  
 28 Australian Bureau of Statistics, *Australian System of National Accounts*, released 27 October 2023.  
 29 Australian Bureau of Statistics, *Labour Force, Australia, Detailed*, released 22 February 2024.

Australia is highly regarded as a destination for mining investment. In 2023, 22 of the largest 50 mining companies in the world had operating assets or exploration projects in Australia and the nation consistently rates as one of the highest in the Fraser Institute's annual survey of mining company executives for both geological potential and policy.<sup>30,31</sup>

*The Minerals Council of Australia estimates that for every job created in the mining industry, another 6 jobs are created throughout the economy via supply chain impacts.*

Beyond its direct economic contributions, the mining industry supports an extensive domestic supply chain that provides advanced equipment, fuels, transportation, and IT services. The Minerals Council of Australia estimates that for every job created in the mining industry, another 6 jobs are created throughout the economy via supply chain impacts.<sup>32</sup> In addition to the direct needs of the mining industry, this broader Mining, Equipment, Technology and Services (METS) sector also requires a highly trained workforce with broad skills including in the fields of engineering, IT, healthcare and environmental science, to name just a few.

Mining's significant contributions to the Australian economy are derived from the export revenue it generates. Revenue from Australia's export of mineral, metal and energy commodities hit a record high \$467 billion in 2022–23,<sup>33</sup> and accounted for 70% of Australia's total export income.<sup>34</sup> Record-high commodity pricing was the principal driver of this outcome, with several key mineral and energy commodities experiencing record pricing over the last 18 months. Australia was able to benefit from this latest price cycle because of the massive investment and workforce expansion of the past decade.

The mining investment boom has transformed both the mining industry and the broader economy. In the 10 years from 2008 to 2018, nominal mining industry investment (including the oil and gas sector) totalled \$589 billion and accounted for 42% of all capital expenditure in Australia.<sup>35</sup> Consequently, the real net capital stock of the mining industry has more than doubled in size to \$995 billion in 2022–23 and now accounts for 20% of the productive capital stock in the Australian economy.<sup>36</sup>

30 AUSMASA analysis based on Mining.com website, *The top 50 biggest mining companies in the world*, released 12 January 2024.

31 Fraser Institute, *Annual Survey of Mining Companies, 2022*, released 4 May 2023.

32 Minerals Council of Australia, *Pre-Budget Submission 2024-25*, released 25 January 2024.

33 Department of Industry Science and Resources, *Resources and Energy Quarterly, September 2023*, Published 3 October.

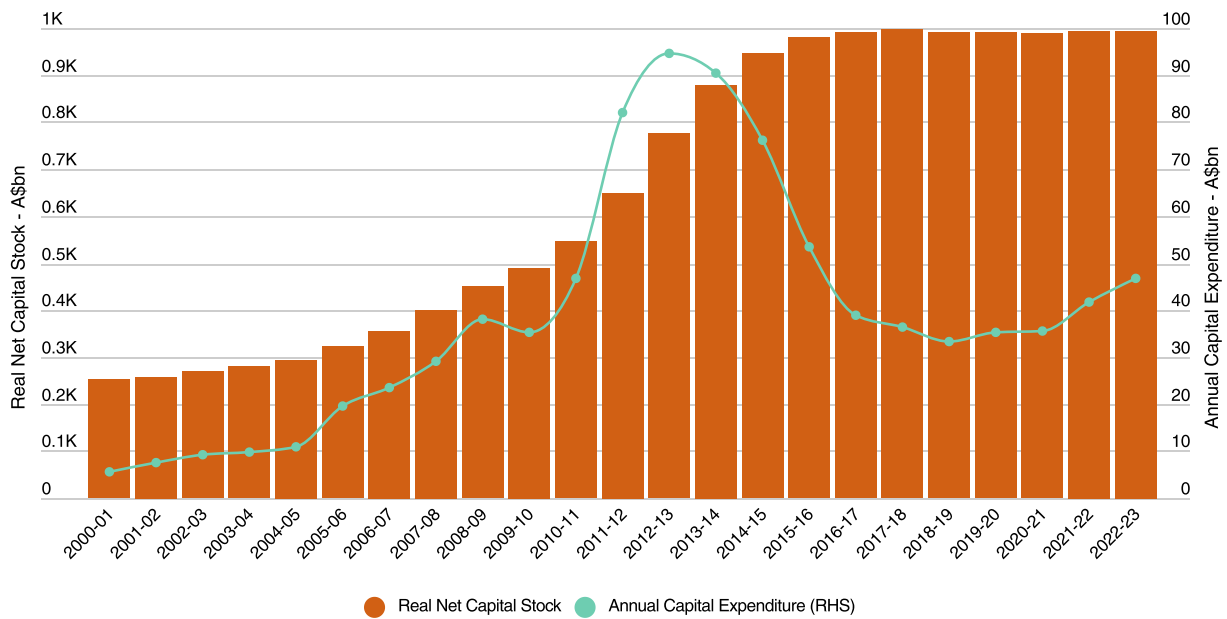
34 Australian Bureau of Statistics, *International Trade in Goods*, released 7 March 2024.

35 Australian Bureau of Statistics, *Private New Capital Expenditure and Expected Expenditure*, released 30 November 2023.

36 Australian Bureau of Statistics, *Australian System of National Accounts*, released 27 October 2023



**Figure 11: Mining industry capital expenditure and capital stock**



Source: Australian Bureau of Statistics, Australian System of National Accounts; Private New Capital Expenditure and Expected Expenditure.

While the mining industry expanded substantially in this time, directly creating over 200,000 new jobs in the process (97,600 in February 2004 to 311,100 in February 2024),<sup>37</sup> the capital growth period has come to a noticeable halt. In nominal terms, annual capital expenditure has fallen more than half since peaking in 2012–13 and the mining industry capital stock has exhibited no growth in the last eight years. Few major mining projects have been initiated in the last 5 years and of those that have started, most have tended to be projects to sustain existing production levels, such as BHP’s South Flank<sup>38</sup> and Rio Tinto’s Gudai-Darri<sup>39</sup> iron ore mines.

Several greenfield mining projects are currently under development and will create new job opportunities within the minerals sector, including Liontown’s Kathleen Valley lithium mine,<sup>40</sup> Iluka’s Balranald mineral sands mine<sup>41</sup> and BCI’s Mardie salt and potash mine.<sup>42</sup> There remain many prospective projects in the early stages of development, but rising construction costs<sup>43</sup> have increased the challenge mining project proponents face in developing new mines and new jobs.

Rather than build new mines, the industry is more likely to invest in new technologies that boost performance at existing mines in terms of productivity and environmental outcome. The former has been a particular challenge within the mining industry over the last two decades. Despite record investment and workforce growth, mining has been one of the worst-performing industries in terms of labour productivity over the last 20 years. According to the ABS, in 2022–23, labour productivity in the mining industry was lower than 20 years ago on a quality-adjusted hours worked basis.<sup>44</sup>

<sup>37</sup> ABS, *Labour Force Survey*, Detailed, February 2023, seasonally adjusted. Access via Jobs and Skills Australia.

<sup>38</sup> BHP, *South Flank*.

<sup>39</sup> Rio Tinto, *Rio Tinto Opens Gudai-Darri, its Most Technologically Advanced Mine*. 21 June 2022

<sup>40</sup> Liontown, *One year anniversary of the first blast at Kathleen Valley*, January 2024.

<sup>41</sup> Iluka, *Balranald minerals sand mine*.

<sup>42</sup> BCI Minerals, *Mardie Salt and Potash*.

<sup>43</sup> ABS, *Producer Price Indexes, Australia*, released April 26, 2024.

<sup>44</sup> Australian Bureau of Statistics, *Estimates of Industry Multifactor Productivity*, released 13 December 2023.

Two possible explanations for this are the decline in mineral ore grades across Australian mines, which ultimately weighs on the volume of payable mineral produced per tonne of extracted ore, and the rapid deployment of a new workforce that needed time to optimise its performance. Little can be done to manage the former so there is a clear need for the Australian mining industry to focus on skills development, workforce retention and re-skilling in the future.



21st century mining boom has redefined Australia's industrial landscape



20 years since the start of the mining boom the industry workforce has more than tripled



Mining has been the largest source of economic growth in the last decade



Australia is highly regarded as a destination for mining investment



The mining industry supports an extensive domestic supply chain



Mining export revenue significantly contributes to the Australian economy



Mining industry capital stock has exhibited no growth in the last 8 years



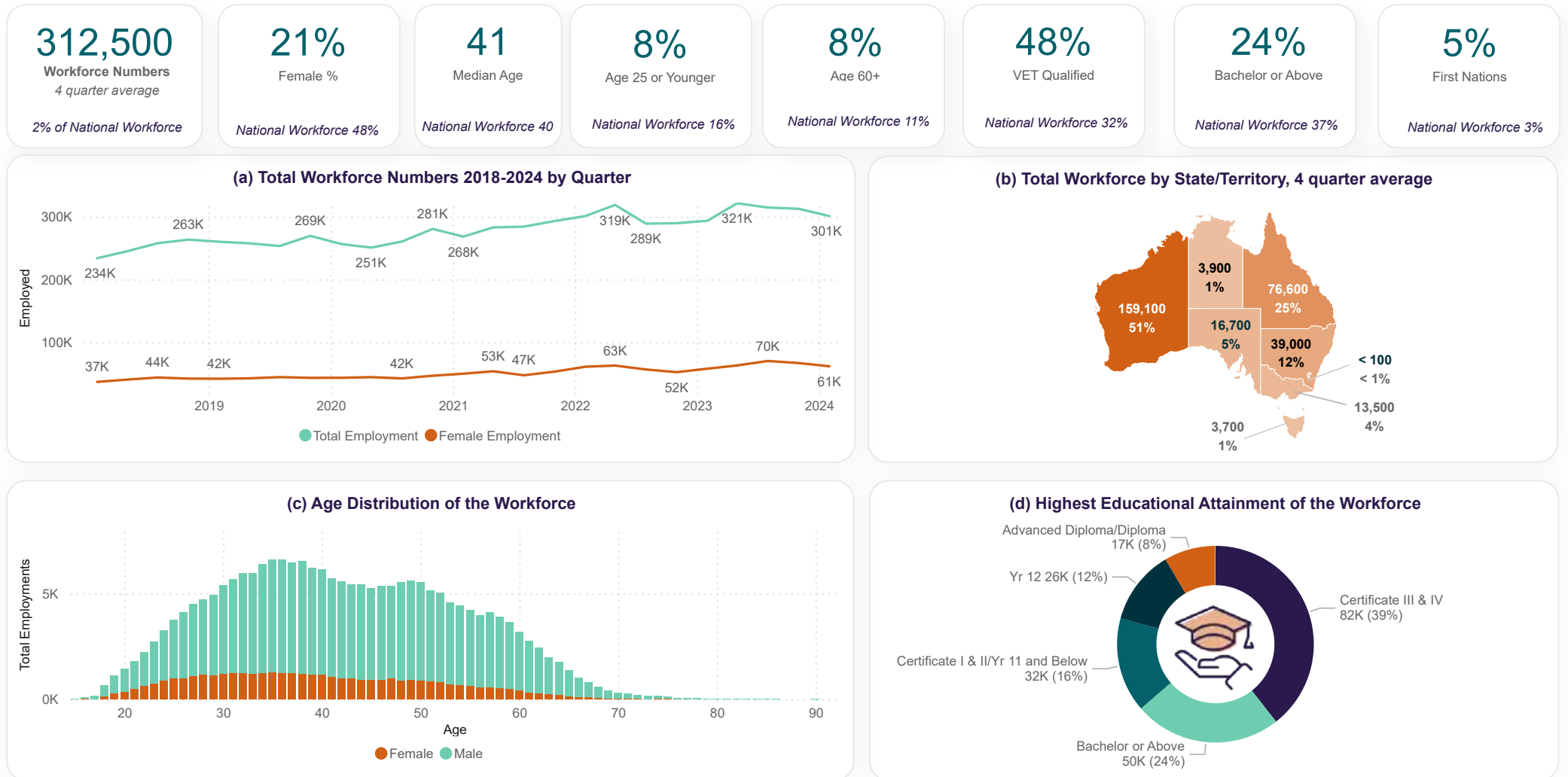
Greenfield mining projects currently under development will create new job opportunities within the minerals sector



Investment in new technologies likely to boost performance

# Workforce insights

Figure 12: Mining Insights Dashboard 1

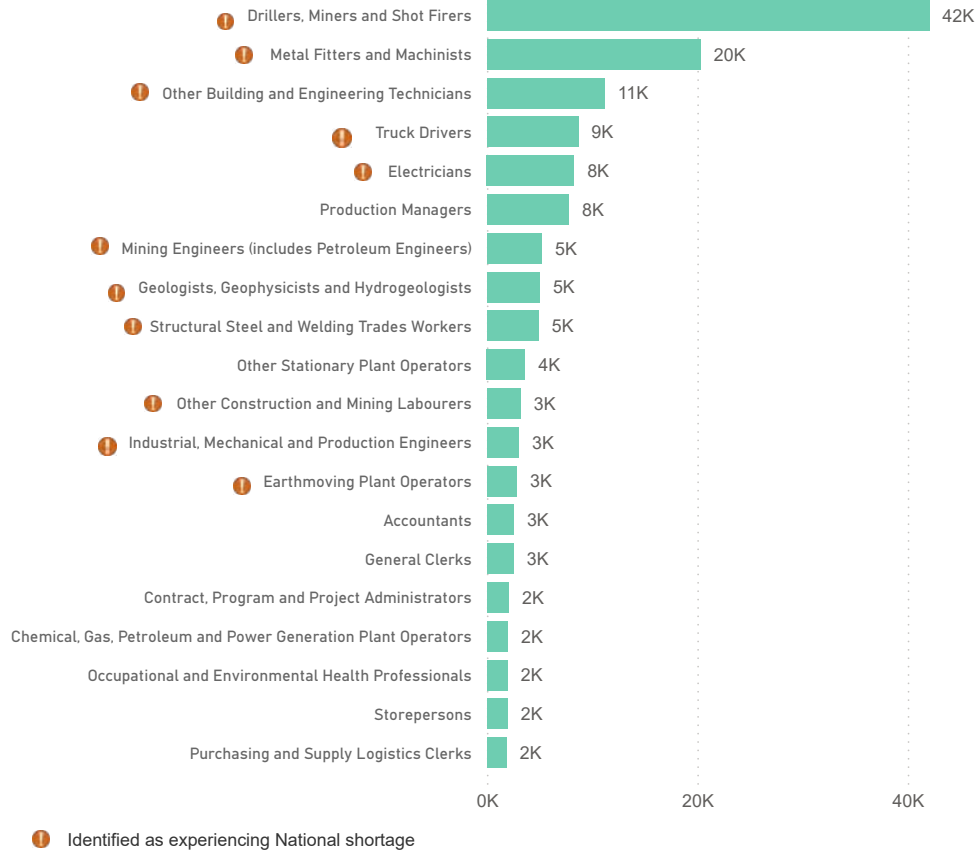


Sources: **(Top row)** Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, 4-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 2-digit level INDP Industry of Employment **(a)** ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 **(b)** ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 **(c)** Census of Population and Housing (AGEP Age and SEX Sex), 2021, TableBuilder **(d)** Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder Notes: Workforce Numbers are rounded to the nearest 100

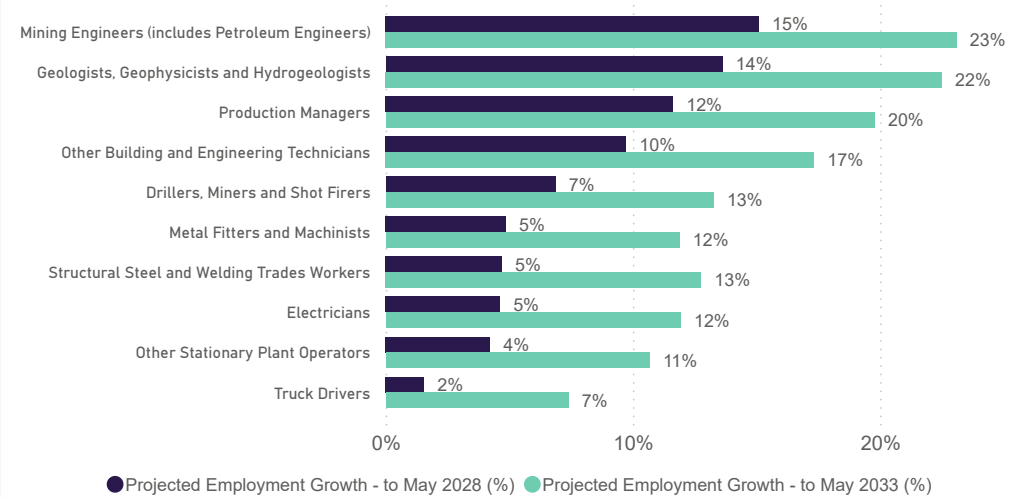
# Workforce insights

Figure 13: Mining Insights Dashboard 2

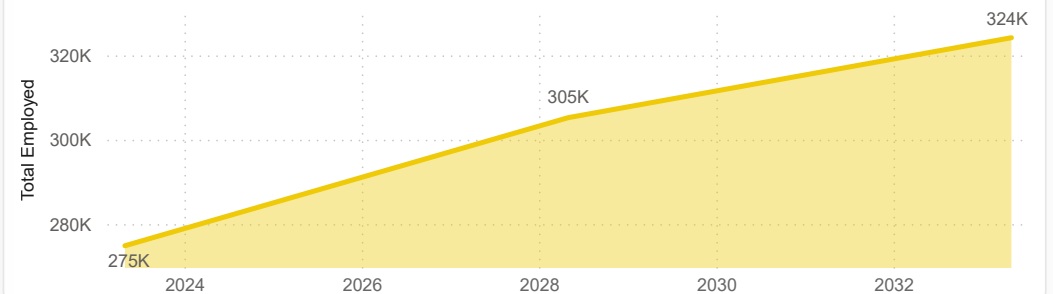
(e) Top 20 ANZSCO Occupations by Workforce Numbers



(f) Employment Projections by ANZSCO Occupations



(g) Employment Projection of Mining Industry

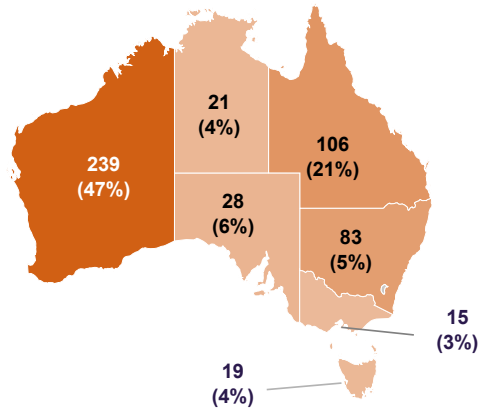


Sources: (e) ABS Table Builder 2021 Census - employment, income and education | JSA Skills Priority List 2023. 4-dig SPL (ANZSCO 2013) (f) Employment Projections produced by VU for JSA (May 2023 to May 2033) (g) Employment Projections produced by VU for JSA (May 2023 to May 2033)

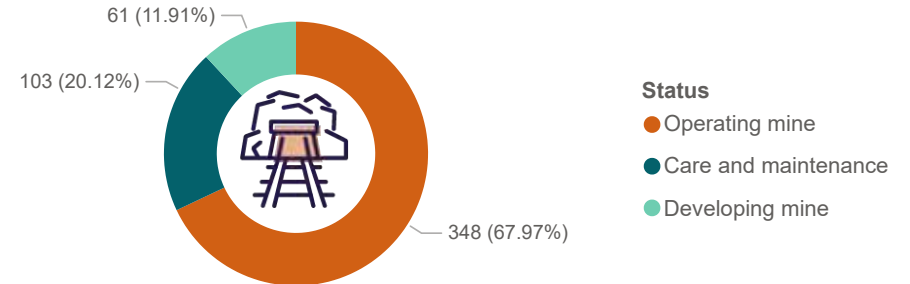
# Workforce Insights

Figure 14: Mining Insights Dashboard 3

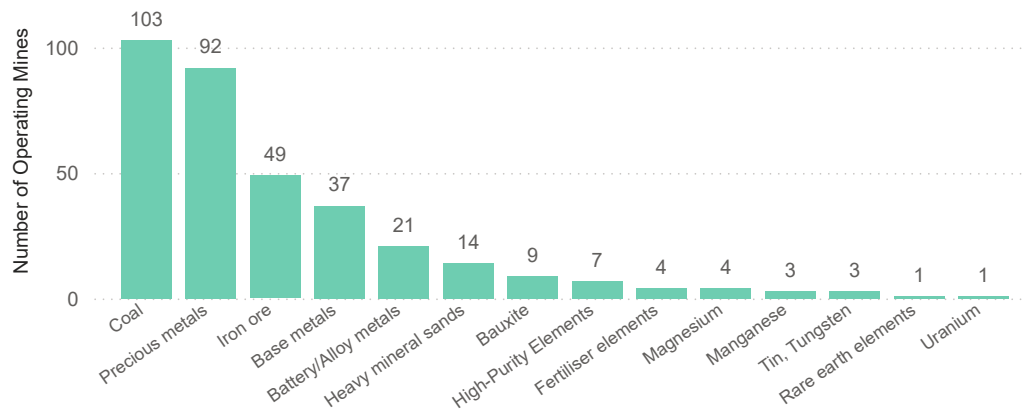
(h) Number of Mine Sites by States and Territory



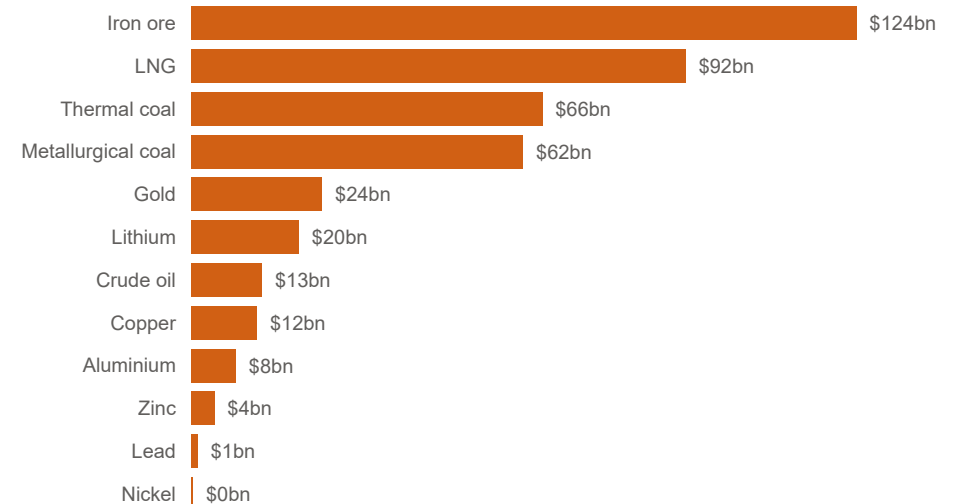
(i) Mines by Operating Status



(j) Operating Mines by Commodity Group



(k) Australia's Major Resources and Energy Exports, 2022-23



Sources: (h) Australian Operating Mines Map 2023 (twenty-fifth edition). Geoscience Australia. February 2024 (i) Australian Operating Mines Map 2023 (twenty-fifth edition). Geoscience Australia. February 2024 (j) Australian Operating Mines Map 2023 (twenty-fifth edition). Geoscience Australia. February 2024 (k) Department of Industry, Science and Resources, Commonwealth of Australia, Resources and Energy Quarterly, March 2024.  
 Note: Developing mines are deposits where the project has a positive feasibility study, development has commenced, or all approvals have been received. Mines under care and maintenance have known resource estimations and may be mined or developed in the future.

## Industry-wide trends and priorities

For the mining industry to continue making a significant positive impact on the Australian economy, it must continue to field a highly skilled, motivated, and efficient workforce. Achieving this goal is influenced by several factors, some shared with the broader economy and some unique to the mining industry itself.

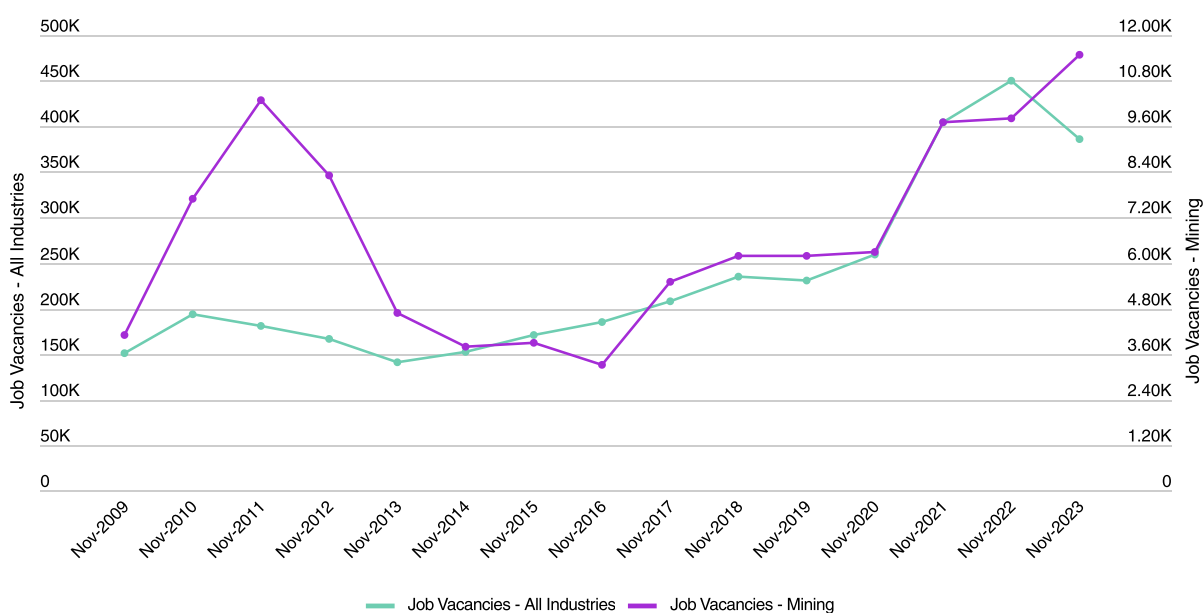
*The mining industry's workforce is under significant pressure, with 11 of the industry's top 20 occupations, by employee numbers, listed as experiencing a shortage according to the Skills Priority List*

## Skills shortages

Near record low unemployment and high job vacancies is an unusual combination indicating that demand for high-skilled workers remains unfilled, [Figure 6](#). This combination is impacting the mining industry, which has not had the decline in job vacancies experienced in most other sectors. Instead, job vacancies within the mining industry remain at record levels and are above the peaks seen during the mining investment boom of 2011 to 2012, [Figure 15](#). This sustained high level of job vacancies is also coinciding with mining industry employment at record high levels, although neither is occurring with a commensurate increase in mineral output for most commodities.<sup>45</sup>

<sup>45</sup> Department of Industry, Innovation and Science, *Resources and Energy Quarterly: December 2023*, released 18 December 2023.

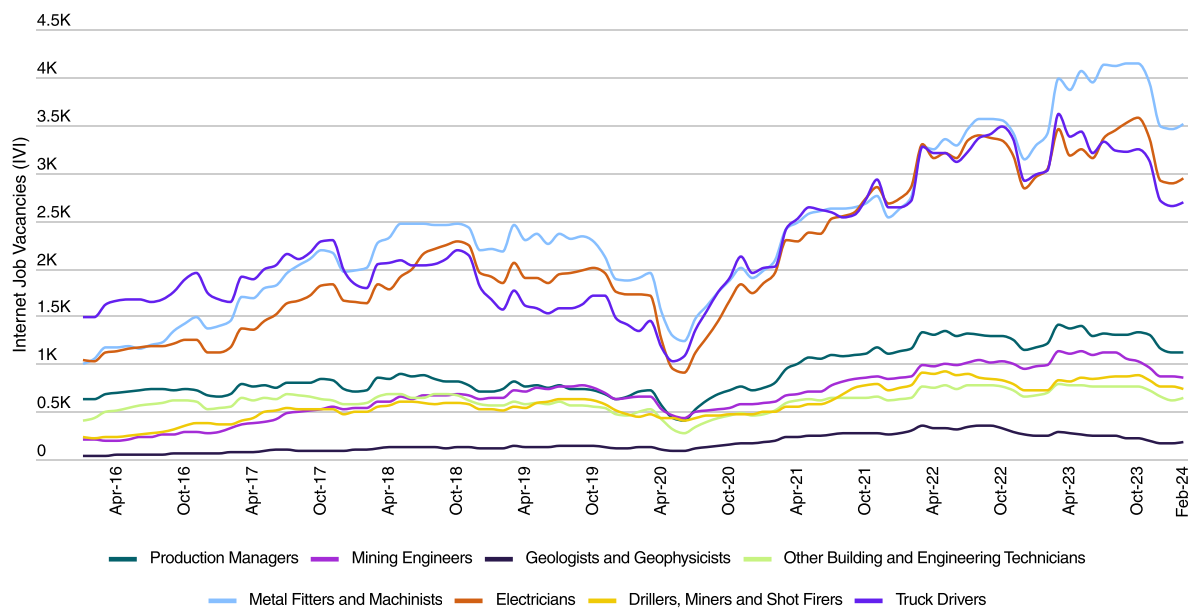
**Figure 15: Job vacancies – Mining compared with all industries**



Source: Australian Bureau of Statistics, November 2023 - Job Vacancies, Australia (Seasonally adjusted).



**Figure 16: Internet Vacancy Index (Top 8 Mining Occupations)**



Source: Jobs and Skills Australia. Internet Vacancy Index, ANZSCO4 Occupations, States and Territories – Feb 2024(4-quarter average).2024.

The mining industry’s workforce is under significant pressure, with 11 of the industry’s top 20 occupations, by employee numbers, listed as experiencing a shortage according to the Skills Priority List.<sup>46</sup> The industry requires its workforce to grow even more in the coming years, making worker attraction and retention key priorities.

While data from JSA’s Recruitment Experiences and Outlook Survey shows that recruitment difficulty has been gradually easing since its peak in July 2022, 52% of recruiting employers still reported difficulties in filling the roles they needed.<sup>47</sup> This phenomenon is industry-wide and impacts both the mining and automotive industries equally.

Data from JSA’s Internet Vacancy Index (IVI) shows that, especially for key occupations in the mining industry, demand for workers is high, higher in fact than pre-COVID, [Figure 16](#).<sup>48</sup> Employer recruitment activity has grown markedly for key occupations such as metal fitters and machinists, electricians, and truck drivers. Other key occupations, such as mining engineers and geologists, have also seen a steady increase in recruitment activity.

<sup>46</sup> Jobs and Skills Australia. ‘Skills Priority List’. 2023.

<sup>47</sup> Jobs and Skills Australia. *Recruitment Experiences and Outlook Survey*. 2024.

<sup>48</sup> Jobs and Skills Australia. *Internet Vacancy Index*. 2024.





## Higher education and pathway opportunities

Mining engineers and geologists, geophysicists and hydrogeologists rank as the two occupations with the strongest forecasted growth within the mining industry, [Figure 13 \(f\)](#). Worryingly, against this backdrop of growth is the fact that national enrolments in engineering-related higher education degrees have been steadily declining since 2019, with data from the Australian Geoscience Council showing a similar decline for studies in earth sciences.<sup>49 50</sup>

The use of higher apprenticeships has been gaining industry attention to address skills shortages and bridge the gap between VET and university-level skills and knowledge. The term ‘higher apprenticeship’ entered the VET lexicon in Australia around 2017, partly because of the 2018 ‘Apprenticeships training — alternative delivery pilots’ program. It defined a higher apprenticeship as “*higher apprenticeships combine a program of structured on-the-job training with formal study, with the study component leading to the award of a VET qualification at the Australian Qualifications Framework level 5 (diploma) or level 6 (advanced diploma)*”<sup>51</sup>

For the mining industry, higher apprenticeships could offer the opportunity to create para-professional occupation pathways for streams such as mining engineering. This would not only help create additional candidate pipelines for higher education but also reduce the pressure on the existing workforce.

Degree apprenticeships, where students work directly within the industry aligned to their studies at the same time as completing higher education courses are used heavily in the United Kingdom.<sup>52</sup> In the 2023-24 UK Academic year, there were 32,500 Level 6 and 7 commencements (Bachelor and Masters equivalent).<sup>53</sup>

The concept is beginning to get traction within Australia, albeit adjusting for the difference in funding and government subsidies that exist here as compared to the United Kingdom. Notably, the University of South Australia, in partnership with employers BAE Systems Australia, ASC and Consunet, recently became the first Australian university to launch a degree apprenticeship program focussed on software engineering to support the defence industry.<sup>54</sup>

49 Department of Education. *Student Enrolments Pivot Table 2022*. 2023.

50 Australian Geoscience Council Inc. *Australian Tertiary Geoscience Education Profile*. 2022.

51 National Centre for Vocational Education Research. *Higher apprenticeships in Australia: what are we talking about?*. 2019

52 Ratemyapprenticeship, *Apprenticeship Levels and Career Options*.

53 UK Government - Explore education statistics, *Academic year 2023/24 – Apprenticeships*, published 9 May 2024.

54 University of South Australia. *All systems go for Australia’s first software degree apprentices*. 2024.

In December 2023, South Australia's Skills Commission approved the country's first declared tertiary traineeship for the vocation of Associate Engineer. The traineeship aims to address workforce demands in the resources and infrastructure sectors by providing a pathway for traditional trades and technical personnel to advance into tertiary engineering roles. This pathway is facilitated through Central Queensland University's Associate Degree in Engineering, with specialisations in Civil, Electrical, Mechanical, Geology, or Mining Engineering, supported by Uni Hub – Spencer Gulf.

Another example of innovation in this space is within the School of Business and Law at Edith Cowan University, where students can elect to complete their Commerce degrees via an initiative called the ECU Extended Internship Program.<sup>55</sup> This program replaces four semesters of the degree with fully paid part-time work in roles directly aligned to the student's field of study.

### AREA OF FOCUS

Reversing the trend of declining enrolments in engineering (especially mining-related) and Earth Sciences degrees is key. Initiatives such as Degree Apprenticeships may assist the higher education sector, and industry, to attract, support and retain students into such specialised fields. Industry would be well placed to work closely with the higher education sector in exploring how Degree Apprenticeships could be adopted.

### AREA OF FOCUS

AUSMASA will investigate initiatives such as higher apprenticeships. This work, coupled with ongoing work to identify the skills needs and career progression pathways for critical roles within the mining and automotive industries, will aim to offer innovative solutions for industry.

Against this backdrop of industry-led initiatives is the Australian Government's reform agenda for higher education, highlighted through the Universities Accord and Tertiary Harmonisation initiatives. These set forth a comprehensive plan to enhance equity, accessibility, and integration within the tertiary education system. These reforms, coupled with specific measures from the 2024-25 budget announcements, aim to create a more inclusive and fair educational landscape.

The Universities Accord is the result of a comprehensive review conducted by an expert panel chaired by Professor Mary O'Kane AC. This review included extensive public consultations and stakeholder engagements, ensuring that a wide range of perspectives and insights were considered. The recommendations from the Accord provide a detailed blueprint for the future of higher education in Australia, focusing on creating a more equitable, accessible, and integrated system that benefits all Australians.<sup>56</sup>

<sup>55</sup> Edith Cowan University. *Work-Integrated Learning*. 2024

<sup>56</sup> The Hon Jason Clare MP, *Release of the Australian Universities Accord*, February 2024

The Universities Accord lays out ambitious targets to significantly increase the tertiary education attainment rate. Currently, 60% of the workforce holds a tertiary qualification, and the goal is to raise this to at least 80% by 2050. This includes increasing the proportion of university-educated Australians aged 25 to 34 from 45% to 55% and boosting the number of individuals with vocational or technical qualifications to 40% by the same year. The Accord emphasises the need for a more integrated system where the barriers between vocational education and training (VET) and higher education are minimised, facilitating smoother transitions for students.<sup>57</sup>

Equity and accessibility are at the forefront of these reforms. The Accord and related budget measures aim to make higher education more attainable for Australians from diverse backgrounds, including those from outer suburbs, regional areas, disadvantaged communities, and Indigenous populations. Specific initiatives are designed to support marginalized and disadvantaged students, ensuring they have the resources and opportunities needed to pursue higher education. This approach seeks to reduce socio-economic and geographic disparities in education access.<sup>58</sup>

Financial support for students is a critical component of the reform agenda. The introduction of the Commonwealth Prac Payment, starting in July 2025, allocates \$427.4 million to support eligible students in teaching, nursing, midwifery, and social work during their practical placements. Additionally, the budget includes reforms to the Higher Education Loan Program (HELP) to make it more equitable by improving the indexation calculation method. This change aims to align HELP debt growth with wage growth, thereby reducing financial pressures on students and preventing excessive debt accumulation.<sup>59</sup>

Increased funding and infrastructure investments are also highlighted in the 2024-25 budget. These investments aim to enhance educational infrastructure and support services, particularly in outer suburban and regional areas, furthering the goal of reducing geographic disparities in education access. By improving facilities and resources, the government aims to provide a better learning environment for all students.<sup>60</sup>

The implementation of these reforms will be staged, ensuring a gradual and sustainable transformation of the higher education system over the next decade and beyond. This phased approach allows for continuous assessment and adjustment of the reforms to meet the evolving needs of

57 The Hon Jason Clare MP, *Release of the Australian Universities Accord*, February 2024

58 The Hon Jason Clare MP, *Release of the Australian Universities Accord*, February 2024

59 Australian Government 2024/25 Budget, *Department of Education - Higher Education*, May 2024

60 Australian Government 2024/25 Budget, *Department of Education - Higher Education*, May 2024





the educational landscape. The ultimate vision is to prepare the Australian workforce for future challenges by increasing the proportion of highly educated and skilled individuals, aligning with the broader goal of a “Future Made in Australia” where the domestic workforce can meet the demands of emerging industries and technologies.<sup>61</sup>

These reforms represent a significant effort by the Australian Government to transform higher education, ensuring that it is inclusive, fair, and responsive to future economic and social needs. By addressing financial, structural, and accessibility issues, the government aims to build a more skilled and equitable workforce, ultimately benefiting various stakeholders, including students from regional and disadvantaged backgrounds.

## Vocational Education and Training

In addition to the important role played by the higher education sector for degree-qualified occupations, the vocational education and training sector is crucial for the mining industry’s success. [Appendix I](#) highlights key enrolment and graduation data for qualifications within the RII training package in support of the mining industry and whose custodianship is with AUSMASA.

While the majority of the VET training within the RII package is delivered via a fee-for-service arrangement, it is important to note that many of the top occupations within the mining industry require a trade qualification, thereby being delivered via an apprenticeship and whose training package (and subsequent reporting) falls within the remit of other JSCs (except AUM and AUR training package qualifications, which are supported by AUSMASA). Examples would include Metal Fitters and Machinists (trained under the MEM package, supported by the Manufacturing Industry Skills Alliance) and Electricians (trained under the UEE package, supported by Powering Skills Organisation).

The industry’s success depends on the attraction and retention of these apprentices, and employers play a pivotal role in supporting apprentices to maximise their learning and success. An area of concern across the whole apprenticeship and traineeship sector, with mining being no exception, is the persistently high drop-off rates.

NCVER completion data for apprenticeships and traineeships that commenced in 2018 reflect a national average completion rate of 55.8% across all occupations within 3–4 years. The automotive trades cohort, many of which are important contributors to the mining workforce, fared slightly better, with 58%, compared to an average rate of 53% for all trade apprenticeships. Mining traineeships in areas such as mobile and

<sup>61</sup> Australian Government 2024/25 Budget, [Department of Education - Higher Education](#), May 2024

fixed plant operations recorded completion rates of 58% and 61% respectively.<sup>62</sup>

Given the effort that is expended to attract new entrants to the industry, minimising losses from the training system must be a priority.

Feedback from numerous mining industry stakeholders has raised the concern that, because of the skills shortages being felt by the industry, the level of mentoring and coaching being provided to apprentices has suffered. It was noted by these stakeholders that the same applied to newly promoted workers too, with the view being that skills shortages were seeing people get promoted more rapidly but perhaps without sufficient levels of mentoring and support required to ensure success.

*national average completion rate of*  
**55.8%** *across all occupations*  
*within* **3–4 years**

Further complicating the training landscape is the fact that training providers (TAFEs and private RTOs) and the industry have both indicated that trainer shortages are impacting their ability to support the industry's full training needs and desires.

In recognition of these pressures, DEWR enacted early changes to the standards for RTOs in relation to trainer qualification requirements. As part of these changes, people who hold an education degree can now be engaged as trainers while also enabling those who were actively working toward a Certificate IV or Diploma from the TAE training package to deliver training and contribute to assessments.<sup>63</sup> These changes, along with the broader use of industry experts, have been welcomed as a practical government approach to assisting industry in an ongoing issue.

## AREA OF FOCUS

AUSMASA will monitor the changes to trainer qualification requirements in addressing trainer shortages and accessibility of vocational education and training, while also working closely with other JSCs to explore broader strategies required to encourage more people to consider engaging with the VET sector as a trainer and assessor.

<sup>62</sup> NCVER. Completion and attrition rates for apprentices and trainees 2022: data tables. Adelaide, November. 2024.

<sup>63</sup> Department of Employment and Workplace Relations. *Early Changes to the Current Standards for RTOs*. 2024.



## Community perceptions of the mining industry

The public perception of the mining industry is impacted by changing societal expectations regarding workplace culture and an increased focus on the environmental and social impacts of extractive industries on communities, human health, and cultural heritage.

Degradation and the unintended destruction of sites sacred to Indigenous people have come at a high reputational cost to the mining industry and certain mining organisations. Following the Juukan Gorge incident, which resulted in the destruction of 2 ancient and sacred rock shelters in the Pilbara region of Western Australia dating over 46,000 years, a parliamentary senate enquiry was established to enquire into and report on the events that led to the incident.

Media coverage of such incidents is likely to have lowered the public's perception of mining as a sector, thereby reducing the appeal of the industry and impacting efforts to attract and retain talented workers.

The number of younger people who are choosing to work within the mining industry is barely keeping up with those who are approaching retirement. To facilitate the workforce growth that the industry needs, it is critical for the mining industry to address and reverse this trend.

Generation Z, which refers to those born between the late 1990s and early 2010s, is projected to represent 27% of the global workforce by 2025<sup>64</sup>. This generation is more connected to digital platforms than any generation before it. From earliest youth, they have been exposed to the internet, to social networks, and to mobile systems.<sup>65</sup> Unlike previous generations of workers, Generation Z is the first generation to not rank remuneration as one of the top two reasons for choosing a career path or industry, instead ranking workplace flexibility and purpose higher.<sup>66</sup>

Research commissioned by AUSMASA provides insight into what Generation Z thinks of mining in Australia. More than 1,000 young people responded to the commissioned survey. Responses showed that nearly three-quarters of respondents felt that the mining industry did more harm than good, 56% would prefer to see the industry decrease in size and, while 87% knew Australia mined coal, only 27% knew that the industry also mined lithium, a key and necessary mineral for a decarbonised future.<sup>67</sup>

64 World Economic Forum. *How Gen Z employment levels compare in OECD countries*. 2021

65 McKinsey & Company. *What is Gen Z?*. 2023

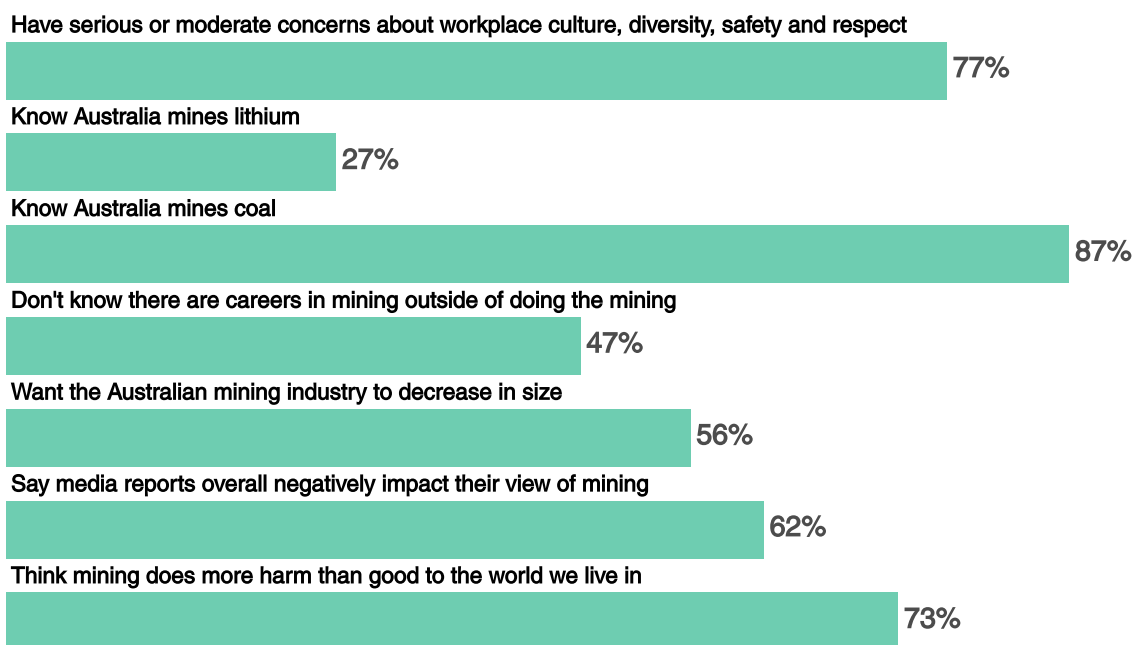
66 McKinsey & Company. *The Gen Z Equation*. 2023.

67 AUSMASA. *What Gen Zs Think of Mining*. 2024.



This creates a problem for the industry. While the mining industry is responsible for producing the minerals and resources that are vital for modern living, including the very technologies that will help ensure a cleaner and more environmentally friendly future, this is not how the younger population perceives the industry.

**Figure 17: What Generation Z think of mining**



Source: AUSMASA Gen Z Perceptions of Mining, developed in partnership with Year13

The Generation Z research also highlighted that, overall, young people don't feel they have people they can discuss mining careers with, although young people from the mining states of Western Australia and Queensland indicated they had access to more advice. For example, 76% of young people from Victoria say they do not speak with anyone about mining careers, followed by 65% from New South Wales, 54% from South Australia, 51% from Queensland and 30% from Western Australia. Overall knowledge of potential career opportunities, be they trade-based or professional, remained low. This is an area of immediate concern for the industry and is exacerbated by the fact that all industries are scrambling and competing for human capital.

### AREA OF FOCUS

AUSMASA will continue to work closely with industry and the National Careers Institute (NCI) to explore ways of better promoting the full breadth of career opportunities within the mining industry.



## Diversified workforce

The mining industry has seen a steady increase in its female workforce over recent years. In 2020, the industry's female workforce was 17% of the total, which has grown to 21% by 2024, or an additional 20,000 women.<sup>68</sup> It is still well below the national percentage of 48%, [Figure 11](#). By continuing to increase female participation, the industry can tap into a broader talent pool, thereby addressing the current skill gaps. Additionally, fostering a more inclusive environment can lead to diverse perspectives and innovative solutions, further strengthening the industry's capacity to meet its demands. Realising that its workplace culture needed significant improvement, the industry has worked hard to make meaningful changes.

*In 2020, the industry's female workforce was 17% of the total, which has grown to 21% by 2024, or an additional 20,000 women. It is still well below the national percentage of 48%*

While that journey continues, the outcome of specific recruitment activities, and supportive training and mentoring programs are being felt. Female enrolments in qualifications from the RII training package have grown 28% since 2015 to 16% of all RII enrolments in 2022. However, this is below the industry's female workforce of 21% of total workforce, indicating there is still work required to attract women to the industry.

Another area where significant ground still needs to be made up is in addressing the gender pay gap present within the industry. Data from the Workplace Gender Equality Agency's latest reporting round found that 95% of mining employers had pay gaps in favour of men, the worst of all industries.<sup>69</sup> While the industry's average pay gap of approximately 15% places it in the middle of the field among other industries, it's clear that more must be done to encourage female employment across the full range of vocational opportunities present in the industry if this gap is to be reduced.

### AREA OF FOCUS

The industry should continue to encourage and support female employment opportunities across all occupations within the mining industry, with the aim of addressing the existing gender pay gap and ensuring comprehensive workforce diversification.

<sup>68</sup> Australian Bureau of Statistics. *Labour Force, Australia, Detailed - Table EQ06*. 2024.

<sup>69</sup> Workplace Gender Equality Agency. *Employer Gender Pay Gaps: Snapshot*. 2024.



## Skilled migration

Skilled migration has been identified by many of AUSMASA's key stakeholders as a logical supporting strategy in helping to fill roles experiencing skills shortages. Broader economic challenges, such as an extremely tight housing and rental market, along with global competition for skilled migrants, have limited the effectiveness of this approach. At 0.78% of the minerals workforce, skilled migrants represent a small but crucial talent pipeline to address skills in critical shortage and 'hard to fill' roles and offer an opportunity to have a larger impact if barriers within the skilled migration system were addressed.<sup>70</sup>

Industry feedback has focussed on the high cost and processing time of the current skilled migration system, further exasperated by Australia's housing shortage.

A balanced rental market is one with a rental vacancy rate of 3% or more.<sup>71</sup> Using Perth as an example, February 2024 vacancy rates of 0.3% significantly hamper the ability of prospective new residents to the

state to find a home.<sup>72</sup> Mining regions also have constrained rental markets. For example, the February 2024 vacancy rate for northern Western Australia was 1%<sup>73</sup> and central Queensland was 0.6%.<sup>74</sup> This certainly impacts prospective skilled migrants and Australian residents who may choose to relocate for work purposes. The national vacancy rate of 0.7%, while slightly better than Perth's, is still considered representative of a housing market under immense pressure.

The Australian Government aims to revamp its migration system to bolster national prosperity and security through its Migration Strategy.<sup>75</sup> The Government acknowledges that migration has historically helped Australia overcome challenges and foster long-term prosperity, but the current system is considered broken and needs a 10-year overhaul, as suggested by the 2023 Review of the Migration System led by Dr. Martin Parkinson.

The February 2024 vacancy rate  
for northern Western Australia was 1% and  
central Queensland was 0.6%

70 Minerals Council of Australia. *Employment goals undermined by damaging IR changes*. 2023.

71 realestate.com.au. *New data proves the rental crisis is worsening and experts are baffled more isn't being done to help*. 2023

72 Domain Research. *Vacancy rates: February 2024*. 2024.

73 SQM Research. *Northern WA Residential Vacancy Rates*. 2024

74 SQM Research. *Central Queensland Residential Vacancy Rates*. 2024

75 Australian Government. *Migration Review*. 2024



## The new Migration Strategy focuses on 5 objectives to realise the Government's vision:

1. Raising living standards for Australians by boosting productivity, meeting skills shortages and supporting exports.
2. Ensuring a fair go in the workplace by complementing the jobs, wages and conditions of all workers and preventing migrant worker exploitation.
3. Building stronger Australian communities by better planning the migration intake and giving migrants the opportunity to invest in their lives in Australia through permanent residence and citizenship.
4. Strengthening international relationships by building stronger economic and social connections with our region and international partners.
5. Making the system work by being fast, efficient and fair for migrants and employers.

## The roadmap includes 8 key actions:

1. Targeting temporary skilled migration to address skills needs and promote worker mobility.
2. Reshaping permanent skilled migration to drive long-term prosperity.
3. Strengthening the integrity and quality of international education.
4. Tackling worker exploitation and the misuse of the visa.
5. Planning migration to get the right skills in the right.
6. Tailoring regional visas and the Working Holiday Maker Program to support regional Australia and its workers.
7. Deepening our people-to-people ties in the Indo-Pacific.
8. Simplifying the migration system to improve the experience for migrants and employers.



## Digitisation and automation

Technological advances such as ongoing digitisation and automation are continuing to change how mining work is undertaken globally, with Australia being no exception and, in many cases, leading this innovation.

Automation allows for the operation of tasks with limited or no direct human involvement. Digitisation is the conversion of analogue information and processes into digital forms, creating vast new data streams and corresponding opportunities through the Internet of Things (IoT).

Automated processes can involve remote-controlled machinery, wherein a human operator controls aspects of the function from a distant location.

They can also involve artificial intelligence (AI) supported machinery. There is often an overlap, with some functions completed by sophisticated systems autonomously while a person maintains control of other functions.

Automated working operations have existed since the Industrial Revolution. When combined with the ability to digitise processes and have automated processes work directly from digitised inputs, these processes can almost eliminate the need for people to be involved in certain job tasks. When this is linked with new AI programs, which can troubleshoot problems as they arise, the human element has the potential to be even further removed from the equation.

For the mining industry, the opportunities for new ways of working have changed how jobs are undertaken in a variety of important ways. Self-driving haul trucks and other mobile plant equipment in surface operations are being used on many mine sites and will soon be commonplace. The autonomous vehicles drive in a pre-orchestrated manner, supported by sophisticated GPS tracking and mine site mapping, and are optimised to be gentler on the equipment than the average human operator.

Autonomous technology has also seen the introduction of driverless trains, with Rio Tinto being the first to use the technology in July 2018 for the delivery of 28,000 tonnes of iron ore from its Tom Price operation to a port at Cape Lambert.<sup>76</sup> In this instance, Rio Tinto's AutoHaul™ team monitored the operation at its Perth Operations Centre, almost 1,500 km away.

While the ongoing introduction of autonomous technology within both the mining and the transport industry more broadly will displace or alter certain job roles (such as haul truck drivers and train drivers), it is also creating new job opportunities.

Autonomous operations need to be designed, developed, installed, tested,

<sup>76</sup> Rio Tinto. *How Did One of the World's Largest Robots End Up Here?* 2019.

and monitored. Technology is giving rise to higher-paying jobs with greater opportunities for remote and flexible work. The growth of remote operations centres is seeing an increase in workers being able to support mining operations from metropolitan rather than remote locations, expanding the demographic of people that the industry can attract to work within it.<sup>77</sup>

These jobs also require higher digital skills, and many need specialised degree qualifications. Job roles created by autonomous technology include autonomous operations controllers, with research by iMove also showing increased demand for roles in IT, cybersecurity, civil engineering, mechanical engineering, and transportation systems design.<sup>78</sup>

A key priority for the industry and government will be to help impacted workers retrain for other job roles that are in demand. Given the current workforce shortage, every engaged and willing worker is a welcome part of the mining industry.

## AREA OF FOCUS

AUSMASA, in partnership with industry and employee representatives, will ensure digitisation and automation training programs and support mechanisms are in place to harness each worker's existing skills and impart new skills.

## Technological advancement

Modern mining operations require hundreds of millions, if not billions, of dollars' worth of investment. It stands to reason that mining operators seek out promising technological solutions where such implementation offers to increase productivity, improve safety or both. As such, the mining sector, despite public perceptions, is increasingly home to technologically advanced processes, systems and innovations.

Technological advancement is creating new job roles within the mining sector. These new roles often

<sup>77</sup> Australian Resources and Energy Group. *A New Horizon: Guiding Principles for the Future of Work*. 2018.

<sup>78</sup> Hussein Dia, Hadi Ghaderi, Sohani Liyanage, Rusul Abduljabbar, and Ali Matin. *Creating our Future Transport and Mobility Workforce*. 2023.



require advanced technical skills and education. Some examples of how technology is being used within the mining sector to improve productivity and safety include the use of advanced data analytics, continuous asset monitoring systems, real-time sensor data, use of robotics and increased augmentation of AI systems.<sup>79</sup>

One example of how a combination of such technologies is being trialled in the mining industry is using autonomous, scanner-equipped robots to inspect underground mines for post-blast safety, with a combined benefit of reduced downtime and increased miner safety.<sup>80</sup>

In its report exploring the future of work in the mining industry, the Minerals Council of Australia (MCA) identified that skills of increasing importance would include change management, collaboration, complex stakeholder engagement, creativity, data analysis, data and digital literacy, design thinking, stakeholder analysis and strategic planning.<sup>81</sup>

Overall, MCA's report identified which roles within the mining sector would be enhanced, redesigned, or automated by technology.

It is not surprising to note that the report identified an eventual fall in demand for operational roles such as drillers, miners, shotfirers and mobile plant operators because of technological solutions, whereas numerous roles, including metal fitters, machinists, electricians, production managers and mining engineers, would continue to see a demand increase.<sup>82</sup>

*metal fitters, machinists, electricians, production managers and mining engineers, would continue to see a demand increase*

Given the sector's ongoing shortage of workers, any roles displaced by technology create opportunities for retraining and redeployment, maximising the retention of experienced employees in the process.

The ability to identify the gaps between existing skills in affected roles and those required by newly created roles will continue to be a priority for AUSMASA in its engagement with the industry, noting that this is a key focus of the [skills mapping project](#) currently underway.

## AREA OF FOCUS

Given that digital skills and digital literacy is a core aspect of technological advancement, AUSMASA will continue to work closely and collaboratively with the JSC responsible for digital skills – the Future Skills Organisation – while conducting its own work around skills mapping.

79 Australian Resources and Energy Group. *A New Horizon: Guiding Principles for the Future of Work*. 2018.

80 Olivia Thomson. *Robots are Increasing Safety and Productivity by Revolutionising Post-Blast Mine Re-Entry*. Australian Mining.com. 2023.

81 EY. *The Future of Work: The Changing Skills Landscape for Miners*. 2019.

82 EY. *The Future of Work: The Changing Skills Landscape for Miners*. 2019.

## Mining and net zero

The Australian Government's Climate Change Bill 2022 enshrined into law an emissions reduction target of 43% from 2005 levels by 2030 and achieving net-zero emissions by 2050, kick-starting a journey towards decarbonisation that the mining industry will play a critical role in achieving.

While the industry is crucial for supplying critical minerals required for decarbonisation, the mining industry itself is addressing how its operations can be accomplished in more sustainable ways.

Mobile plant equipment such as dump trucks, excavators and shovels have generally been powered by large diesel engines, giving rise to a significant demand for heavy diesel mechanics. Increasingly, mobile plant manufacturers are working with mining companies to roll out either diesel-electric or fully electric equipment options.

Diesel-electric mobile plant equipment uses a diesel engine to power a generator, which in turn generates electricity to run electric motors. Technology such as trolley-assist can provide an additional source of energy for dump trucks on certain sections of haul roads.<sup>83</sup> Fully electric mobile plant either relies on batteries to provide electric energy or high-voltage trailing cables for equipment such as shovels and excavators.<sup>84</sup>

The ongoing transition of mobile plant and light vehicles away from diesel and onto battery-electric systems is driven by the mining industry's commitment to a decarbonised operational future and, in the case of BHP, is seen as more efficient than transitioning to hydrogen-powered solutions.<sup>85</sup>

While hydrogen may play a significant role in a decarbonised Australian future, it does require investment in refuelling infrastructure. Many mine sites already generate their own electrical power due to their off-grid locations, and assuming the output is sufficient to run existing operations and charge a battery-electric mobile plant, no additional refuelling infrastructure or supply-chain logistics would be required.

*The ongoing **transition** of mobile plant and light vehicles **away** from **diesel** and onto **battery-electric** systems is driven by the mining industry's commitment to a **decarbonised** operational future*

<sup>83</sup> Troy Adams. *An introduction to trolley-assist haulage systems*. 2022.

<sup>84</sup> Jacinta Bowler. *Fortescue deploys Australia's "first fully electric" excavator on way to zero emissions in Pilbara*. The Driven. 2023.

<sup>85</sup> BHP. *Operational Decarbonisation*. 2023.



The transition to electrification has created a scenario whereby heavy diesel mechanics will need to be upskilled to support both diesel and electric plant and vehicles, blurring the line between mechanical and electrical-related tasks. Achieving this requires both a training strategy (with supporting training packages) and greater clarity as to where the role of a heavy diesel mechanic finishes and that of an electrician begins. Heavy diesel mechanics will be one of the focus occupations for AUSMASA's [skills mapping project](#).

### AREA OF FOCUS

While capturing the transition to electrification using ANZSCO presents some difficulties, AUSMASA welcomes the release of JSA's Clean Energy Capacity Study and looks forward to providing key insights into this workforce transformation challenge.

## Mine closure and post-mine land use

Every mine site has a finite life linked to the economically viable quantity of recoverable resources. CSIRO estimates suggest that 240 existing Australian mines will close by 2040, generating up to \$4 billion in expenditure on mine rehabilitation and closure activities.<sup>86</sup>

This demand for mine rehabilitation and closure activities requires a broad mix of skills from traditional trades to environmental and agrarian knowledge and First Nations cultural awareness.

While many of the skills required to undertake mine closure and post-mine land use tasks are already covered by units of competency across multiple training packages, research by the Cooperative Research Centre for Transformations in Mining Economies (CRC TiME) has suggested that additional skills are not currently catered for by the VET or higher education system.

*CSIRO estimates suggest that **240** existing Australian mines will close by **2040**, generating up to **\$4 billion** in expenditure on mine rehabilitation and closure activities*

Mine closure and post-mine land use operations also create a unique opportunity for increased participation by First Nations communities, including in the planning and execution of such works. Feedback from the industry suggests specialised training programs for this phase of a mine's life would help develop the necessary skills of the workforce.

### AREA OF FOCUS

AUSMASA will continue to work closely with industry and CRC TiME to define what VET programs could be developed to support this important workforce need.

<sup>86</sup> CSIRO. Enabling mine closure and transitions: Opportunities for Australian industry. 2023.



## Workplace cultural reform

Workplace cultural reform refers to deliberate and organised efforts to transform workplace values, behaviours, and the overall culture within an organisation. It aims to foster safety, diversity, equity, and inclusion by challenging and changing existing attitudes and practices that perpetuate inequalities.

As a dimension of cultural reform, the prevention of sexual harassment in the workplace is critical. The 2022 Australian Human Rights Commission report '*Time for Respect: Fifth national survey on sexual harassment in Australian workplaces*' highlighted "power imbalances and the misuse of power related to gender inequality and other forms of discrimination and disadvantage, combined with specific workplace risk factors, continue to drive sexual harassment against some people more than others" and that these experiences can have harmful and significant negative impact on individual's mental health, productivity and more broadly the economy.<sup>87</sup>

### The report highlighted several key messages:

Sexual harassment continues to be an unacceptably common feature of Australian workplaces, with one in 3 workers experiencing workplace sexual harassment in the last 5 years.

Most sexual harassment in Australian workplaces is carried out by men.

Half of incidents are repeated and of those, half are ongoing for more than one year.

Reporting remains low with only 18% of sexual harassment incidents reported.

Only a third of Australian workers think their organisation is doing enough.

The Australian Human Rights Commission has new regulatory powers to investigate and enforce compliance with positive duty. Positive Duty legislation on employers came into force in December 2023 and has been established to eliminate workplace sexual harassment and discrimination. Employers must take 'reasonable and proportionate measures' to eliminate, as far as possible, unlawful sex discrimination including sexual harassment.

<sup>87</sup> Australian Human Rights Commission. *Time for respect: Fifth national survey on sexual harassment in Australian workplaces*. 2022.

*The mining industry has acknowledged the challenges it faces regarding workplace culture, particularly concerning bullying, sexual harassment, and assault.*

The mining industry has acknowledged the challenges it faces regarding workplace culture, particularly concerning bullying, sexual harassment, and assault. These issues have a negative impact on the sector by contributing to poor public perception and deterring new entrants into the industry.

Polling of industry stakeholders at a recent AUSMASA online workforce planning workshop showed that the industry feels that inroads are being made to address these challenges. Only 11% of stakeholders felt that

the mining industry culture had not improved, with 52% believing that either moderate or significant improvements had been achieved.

Workplace cultural reform, particularly as it relates to sexual harassment, bullying and racism, continues to spark intense conversations across a broad range of industries, resulting in the creation of focused training initiatives. Supporting positive change within its own state, the Western Australian Government announced the establishment of the Mental Awareness, Respect and Safety (MARS) Program in December 2021 to address serious mental health, workplace culture and safety issues in the Western Australian mining industry. The MARS program is an inter-agency collaboration involving the Department of Mines, Industry Regulation and Safety (DMIRS), the Mental Health Commission, the Equal Opportunity Commission, and the Department of Communities.

As part of the MARS program, Edith Cowan University has established the MARS Centre, to support the mining industry in achieving mentally healthy workplaces, build a culture of safety and respect, and prepare for workplace safety in future mining.<sup>88</sup> An early initiative of the MARS Centre was to develop a new Graduate Certificate of Leadership in Mining Workplace Safety, for which the state government has offered scholarships for those working in the Western Australian mining industry.

In all instances, the programs developed to provide training on identifying and managing cultural reform, the prevention of sexual harassment, bullying, and racism, and the support of safety, diversity, equity,

<sup>88</sup> Edith Cowan University. *Mental Awareness, Respect and Safety (MARS) Centre*. 2024.



and inclusion in the workplace are either non-accredited VET programs or higher education-delivery programs.

One methodology for facilitating cultural reform and instilling learning and knowledge in Australia's workforce is developing core skills and knowledge in qualifications. It is critical that Australia's workforce learns and gains skills and knowledge about the importance of the prevention of sexual harassment, bullying, and racism and how they ensure safety, diversity, equity, and inclusion in the workplace.

### AREA OF FOCUS

AUSMASA proposes to collaborate with other JSCs to develop an accredited training program, with supporting resources, for developing safe and respectful workplaces. This program would be made available across multiple training packages.

## Mental Wellbeing

A significant portion of the Australian population has experienced mental health issues. The 2020–2022 National Study of Mental Health and Wellbeing,<sup>89</sup> found that 8.5 million Australians aged 16 to 85 (43% of the population) had experienced a mental illness at some point in their lives. Furthermore, 4.3 million individuals (22%) reported experiencing a mental illness within the 12 months preceding the study. The most prevalent mental health conditions identified were anxiety disorders, affecting 3.4 million people (17%); affective disorders, impacting 1.5 million (8%); and substance use disorders, which affected 650,000 people (3%).

While a subset of the population, the mental health of workers in the Australian mining industry is a critical concern due to the unique challenges faced by these workers, such as remote locations, long shifts, and physically demanding work. The male-dominated nature of the industry also contributes to mental health challenges, as prevalence rates of mental disorders can be significantly elevated in male-dominated industries such as mining.<sup>90</sup> Beyond the direct impact on the person affected, mental health issues also impact workforce productivity, leading to decreased efficiency, higher absenteeism, and increased turnover rates, resulting in substantial financial costs for employers.<sup>91</sup> Despite existing initiatives like employee

89 Australian Bureau of Statistics, *2020–2022 National Study of Mental Health and Wellbeing (NSMHWB)*, 2024

90 Roche et al, *Men, Work, and Mental Health: A Systematic Review of Depression in Male-dominated Industries and Occupations*, 2016

91 Bloom et al, *The Global Economic Burden of Non-communicable Diseases*, 2011



assistance programs, on-site counselling, and stress management workshops, more tailored mental health programs are needed.

Further research is required to quantify the effects of mental health issues on productivity and compensation claims within the mining industry. Such research would provide valuable data to guide investment in mental health initiatives by demonstrating the tangible benefits of these programs, including reduced compensation claims and improved productivity.

The MARS program has been effective in promoting mental health awareness in the industry. Expanding this program to include specific training on mental wellbeing and recovery is recommended to enable early intervention and equip workers with the skills to recognise and respond to mental distress. Integrating mental health awareness into existing safety training programs is crucial to creating a more holistic approach to worker well-being, emphasising that mental health is as important as physical safety.

### AREA OF FOCUS

Research is required to quantify the effects of mental health issues on productivity and compensation claims within the mining industry.

### AREA OF FOCUS

AUSMASA proposes to collaborate with other JSCs, especially HumanAbility, to investigate the appropriateness of current mental health training programs and packages for remote workers such as those in the mining industry.

## First Nations employment and engagement

Aboriginal and Torres Strait Islander traditional custodians and communities are fundamental partners in mining and integral to the social and economic contribution that mining makes to Australia.

Government initiatives play a pivotal role in increasing the percentage of First Nations employees and ensuring social and cultural accountability. Programs such as the Indigenous Procurement Policy and the Indigenous Skills and Employment Program, have incentivised businesses to recruit and retain Indigenous Australians, thereby increasing employment in these sectors.

The 2023 Intergenerational Report highlights the importance of genuine engagement and collaboration with First Nations communities to attract First Nations Aboriginal people into the mining industry. This engagement should promote benefit sharing and respect of the land and water rights and interests of First Nations people and communities.<sup>92</sup>

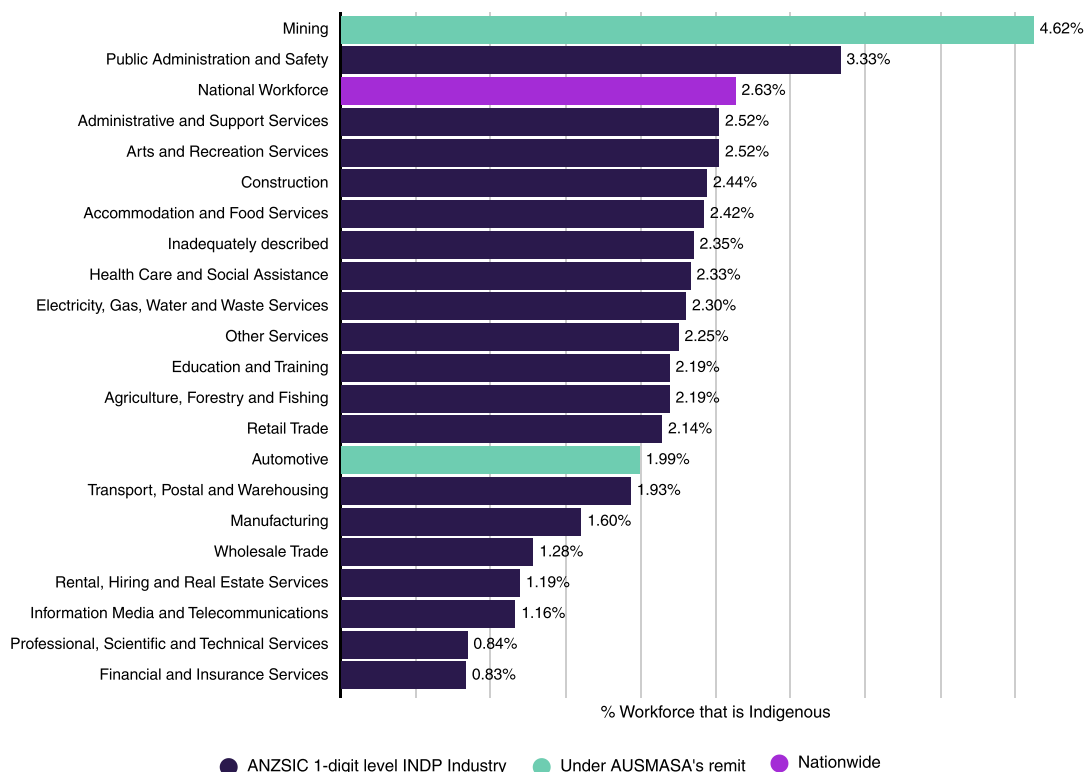
*First Nations Australians accounted for 4.6% of the mining workforce, which was above the average of 2.6% for all industries*

<sup>92</sup> The Australian Government. *Intergenerational Report 2023*. 2023.

According to 2021 census data, First Nations Australians accounted for 4.6% of the mining workforce, which was above the average of 2.6% for all industries.<sup>93</sup> The percentage of the mining workforce represented by First Nations employees has grown strongly, from 1.3% in 2011 to 3.8% in 2016.

As of March 2023, First Nations Australians represented 12.3% of all mining apprentices and trainees, which was higher than the all-industries average of 6.1%.<sup>94</sup> While such strong participation by First Nations peoples in the apprenticeship system is encouraging, it should be noted that First Nations completion rates within trade apprenticeship qualifications are significantly lower than non-Indigenous students, suggesting that additional mentoring and support ought to be implemented in order to boost completion rates.<sup>95</sup>

**Figure 18: Proportion of Indigenous workforce by industry**



Note: the proportion of the Automotive Industry has been calculated by averaging the 3-digit ANZSIC groups covering the industry. For the detail of the groups please refer to AUSMASA's Workforce Plan Backbone

Source: ABS Table Builder 2021 Census - employment, income and education

While the mining industry employs First Nations people at a higher rate as a proportion of its workforce than any other industry, it is important to note that many more First Nations Australians work in other sectors of the economy. Equally, given that the mining industry operates directly on the land of many First Nation peoples, it should be expected that their ability to share in employment opportunities is prioritised.

While mining companies have a growing track record of creating training and employment programs for First Nations communities, be that as part of direct mining operations or roles such as rangers, some

93 Australian Bureau of Statistics. 2021 Census - DataBuilder - Indigenous Employment by Industry. 2023.

94 NCVER. Apprentices and trainees 2023 - March quarter DataBuilder, Contract status, Employer industry 2-digit by Indigenous status, 12. 2023.

95 Jobs and Skills Australia. *First Nations People Workforce Analysis*. 2023.



miners are also in the process of including First Nations stakeholders at much more strategic stages of their operations.

One such example includes Rio Tinto's partnership with the Yinhawangka Aboriginal Corporation (YAC) in co-designing the Western Range mining project, which was Rio Tinto's first co-designed mine. YAC and Rio Tinto jointly developed a social and cultural heritage management plan, which outlines protocols for joint decision-making on environmental matters, mine planning and closure.<sup>96</sup>

As discussed in the section on [mine closure and post-mine land use](#), there are significant training and employment opportunities for First Nations communities in this growing area of the mining life cycle. AUSMASA will continue to work closely with stakeholders to advance projects aimed at supporting the training of skills in this area.

### AREA OF FOCUS

AUSMASA will continue to monitor First Nations training, apprenticeships, and job outcomes to identify best practices and assist in addressing the challenges faced by First Nations individuals in securing and thriving in mining careers. By analysing these outcomes, the industry will have the data it needs to implement targeted strategies and improve support.

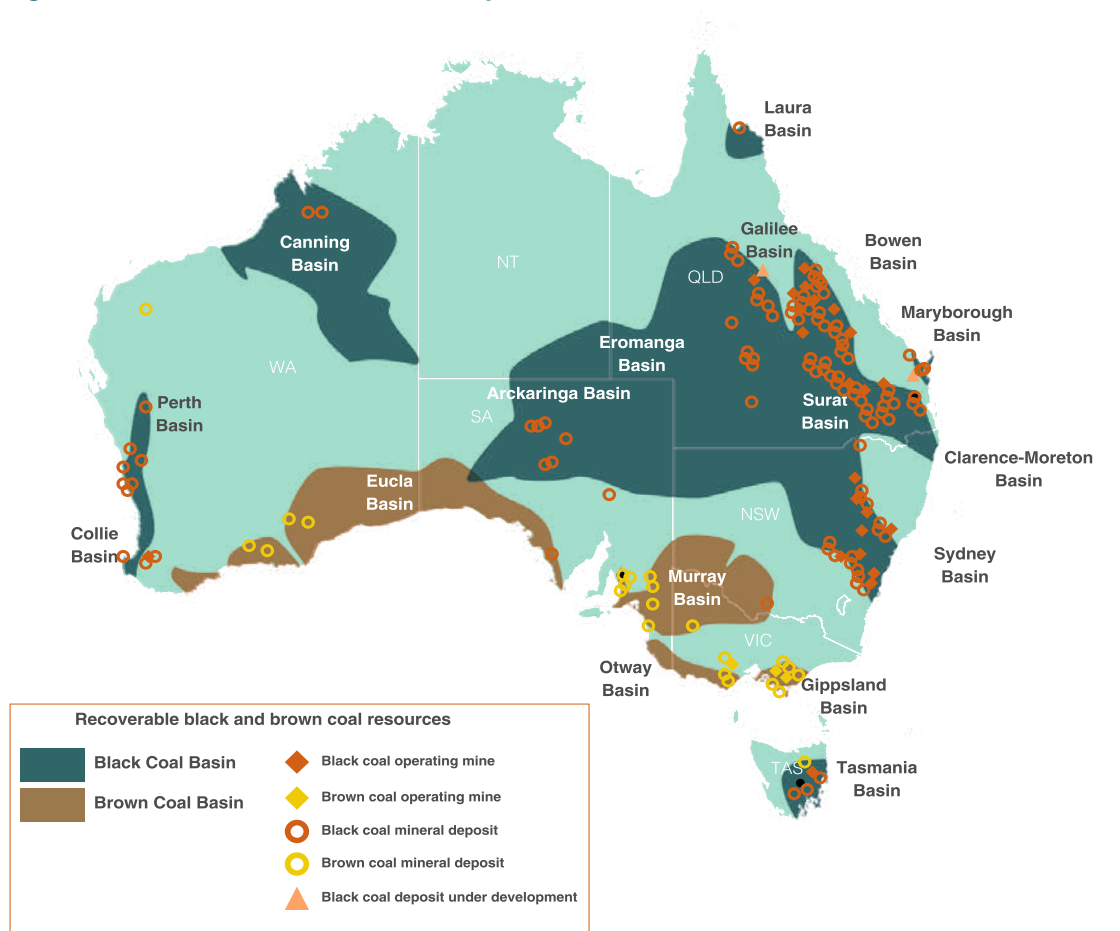
<sup>96</sup> Yinhawangka Aboriginal Corporation. *Preserving Yinhawangka Culture*. 2024.

## Coal mining overview

The mining and consumption of coal in Australia have been the foundation of the Australian economy for decades. The sector is a globally competitive industry, a major centre of regional employment and a key source of export income for the nation. Coal mining has, at some stage, occurred in all states across Australia<sup>97</sup> but is today concentrated in the Bowen-Surat basin of Queensland and the Hunter region of New South Wales. Locally important mining also occurs in Collie (Western Australia), the Illawarra region (New South Wales), the La Trobe Valley (Victoria) and Fingal (Tasmania). Across these regions, the Australian coal industry employs over 50,000 people and creates significant additional employment opportunities via its extensive regional supply chains.<sup>98</sup>

The size and quality of Australia's coal resources have been key drivers of the industry's establishment and success. Australia is the fifth largest producer of coal in the world and contains the fourth largest resources of black coal in addition to the second largest brown coal resources.<sup>99</sup> Australian black coal is used predominately as (1) thermal coal, also called steaming coal, for electricity generation and (2) coking coal, also called metallurgical coal, in the iron and steel industries.<sup>100</sup>

**Figure 19: Australian coal mines and deposits**



Source: Geoscience Australia. 2023b. Coal, 2024

97 Geoscience Australia, *Coal*, 19 April 2024.

98 Australian Bureau of Statistics, *Labour Force, Australia, Detailed*, released 25 January 2023.

99 Geoscience Australia, *Australia's Identified Mineral Resources*, March 2024.

100 Geoscience Australia, *Black Coal*, 19 December 2023.

Australia's thermal coal is renowned for its high energy content with low ash and sulphur and is a reliable source of energy in electricity markets across Asia. While the US and most European nations are moving away from thermal coal in accordance with their Paris climate agreements, this is being more than offset by rising thermal coal consumption in Asia and initial estimates indicate 2023 was another record year for world coal use.<sup>101</sup>

Australia is also the world's leading exporter of metallurgical coal used in steel production. The steel industries of India, Japan, and South Korea all rely on Australian metallurgical coal for use in their blast furnaces. New technologies are being pioneered that use alternative reduction methods to smelt iron ore, but these are still in the early development stages. Metallurgical coal is expected to be in high demand in Australia's current markets for some time to come.

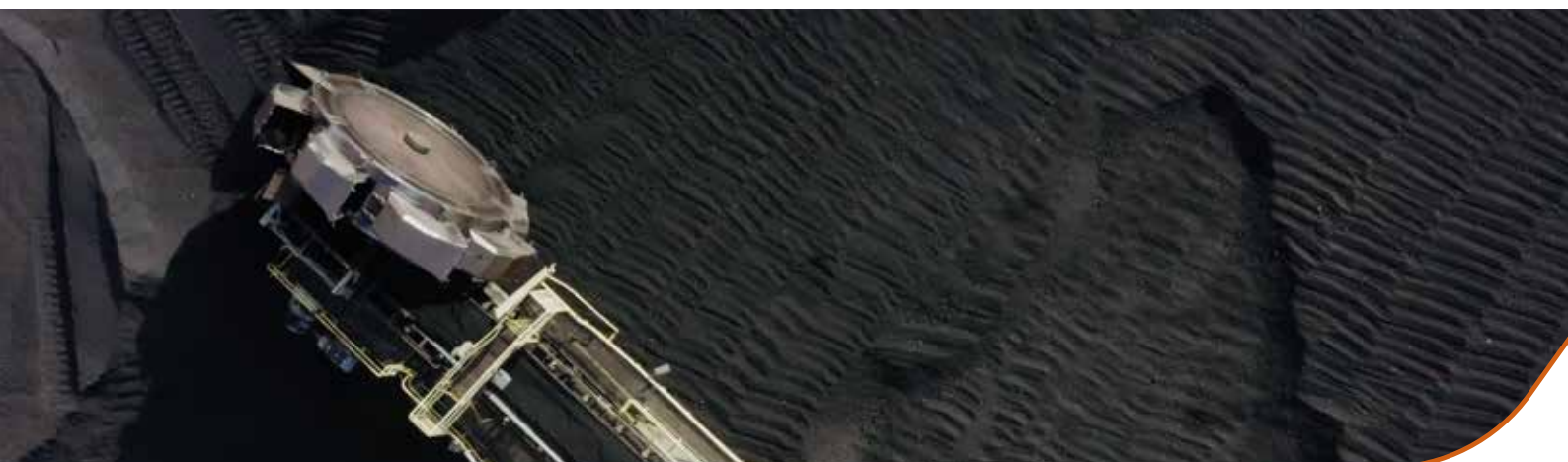
Australia's coal industry is primarily export-focused, and coal was our largest mineral or energy commodity export up until 2009–10, when rising iron ore demand from China had it claim the top spot in Australia's exports. In 2022–23, coal reclaimed the title of largest export in Australia with a record-high export revenue of \$127 billion. This strong earnings result came despite export volumes for both metallurgical and thermal coal falling to their lowest levels since 2012–13. The surge in global energy prices and limited availability of metallurgical coal due to restrictions on supplies from Russia pushed coal prices to all-time high levels. Prices have since moderated but remain at historically high levels that are supporting a rebound in investment. Several new mines are now under development or scheduled to re-start, which will provide increased job opportunities in major coal-producing regions.

In **2022–23**, coal reclaimed the title of largest export in Australia with a record-high export revenue of **\$127 billion**

Australian metallurgical coal production and exports have been constrained in recent years by bad weather and logistical problems. Demand factors also played a role, including relatively soft steel production among some regional importers, and sustained low exports to China even following the removal of trade restrictions. Australian thermal coal exports finished 2023 on a strong note, with 18.9 Mt exported in December. This is the highest monthly total since July 2021 and suggests that disruptions to coal mining and transport infrastructure have been largely resolved.<sup>102</sup>

101 International Energy Agency, *Coal 2023*, released 15 December 2023.

102 Department of Industry, Innovation and Science, *Resources and Energy Quarterly: March 2024*, released 28 March 2024.





# Coal mining workforce demographics insights

Figure 20: Coal mining workforce demographics insights

50,400

Workforce Numbers  
4 quarter average

15%

Female %

41

Median Age

8%

Age 25 or Younger

7%

Age 60 +

56%

VET Qualified

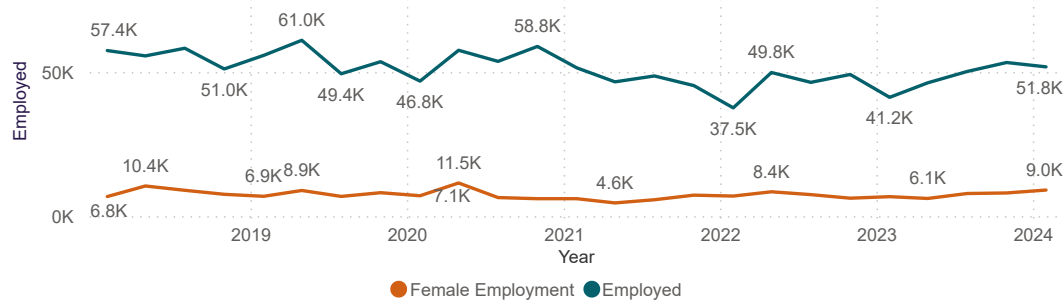
15%

Bachelor or Above

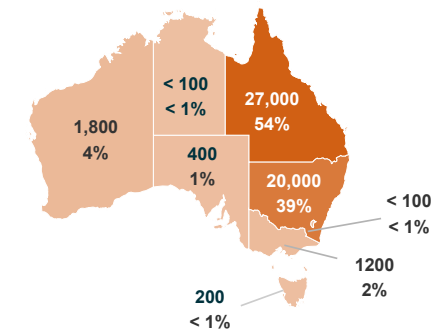
5%

First Nations

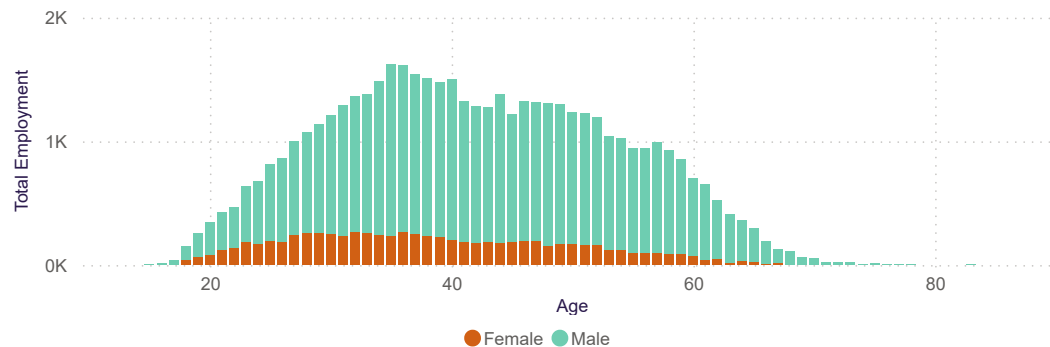
(a) Total Workforce Numbers 2018 - 2024 by Quarter



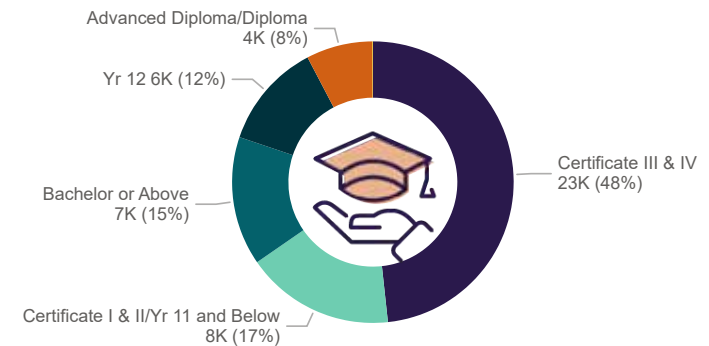
(b) Total Workforce by State/Territory, 4 quarter average



(c) Age Distribution of the Workforce



(d) Education Level of the Workforce

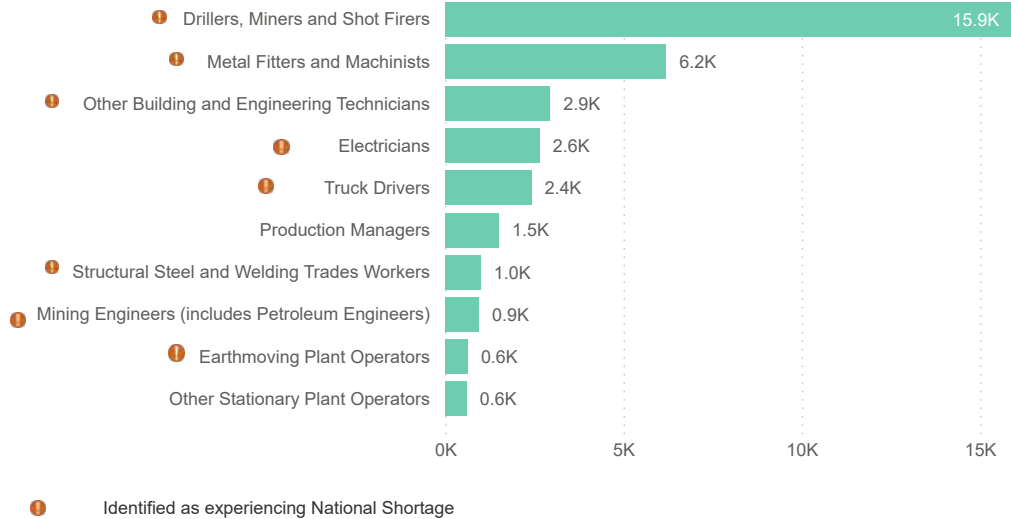


**Sources:** (top row) Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, Four-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 2-digit level INDP Industry of Employment (a) ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 (b) ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 (c) Census of Population and Housing (AGEP Age and SEX Sex), 2021, TableBuilder (d) Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder. **Notes:** Workforce Numbers are rounded to the nearest 100.

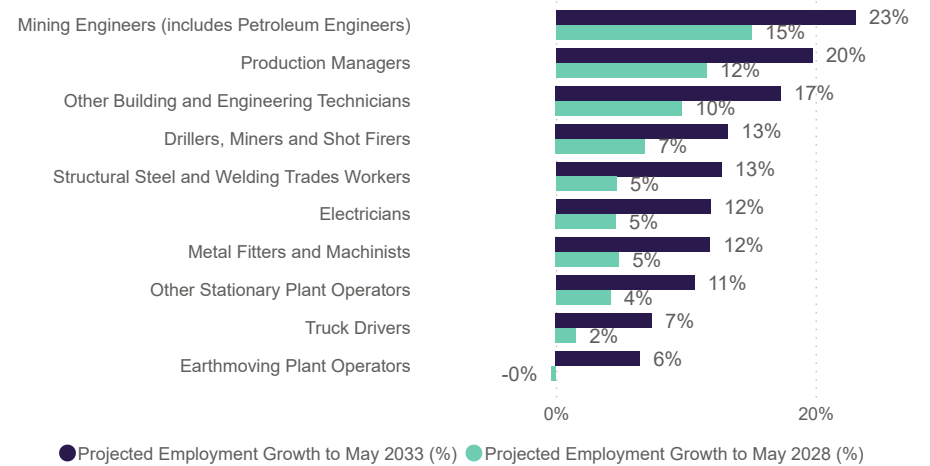
# Coal mining workforce occupations and VET qualification insights

Figure 21: Coal mining workforce occupations and VET qual insights

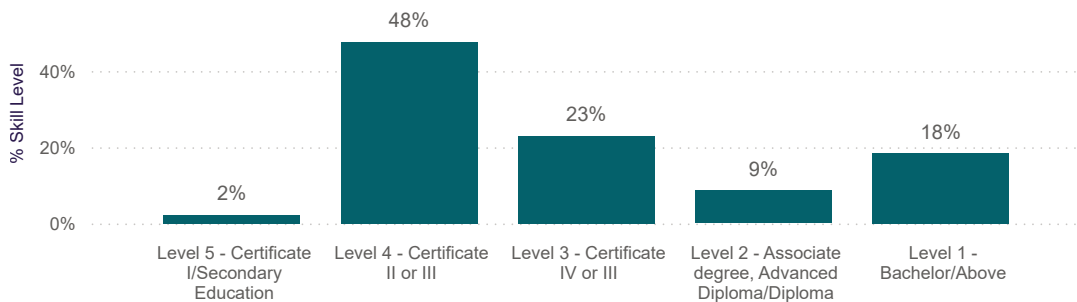
(e) Top 10 ANZSCO Occupations by Workforce Numbers



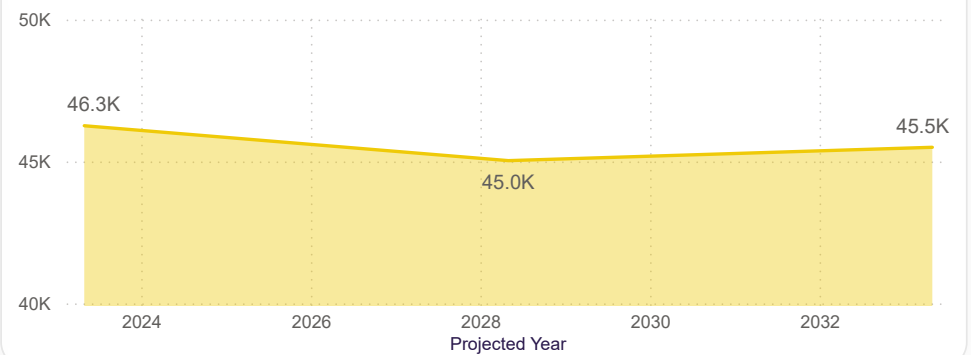
(f) Employment Projections by ANZSCO Occupations



(g) Coal Mining Workforce Occupation Skill Level Commensurate with



(h) Employment Projections of Coal Mining

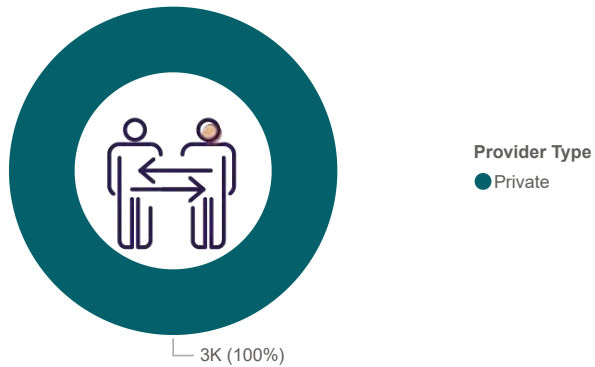


Sources: (e) ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL(ANZSCO 2013) (f) Employment Projections produced by VU for JSA (May 2023 to May 2033) (g) ABS Table Builder 2021 Census - employment, income and education (OCSKP Occupation Skill Level by INDP Industry of Employment) (h) Employment Projections produced by VU for JSA (May 2023 to May 2033)

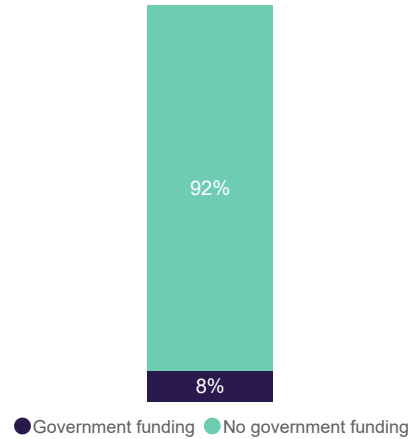
# Coal mining workforce RII training package insights

Figure 22: Coal mining workforce RII training package insights

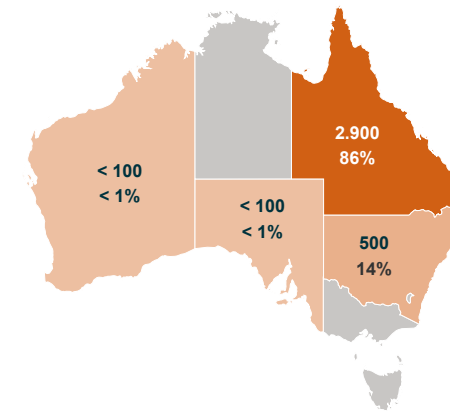
(i) Enrolments by Type of Training Providers



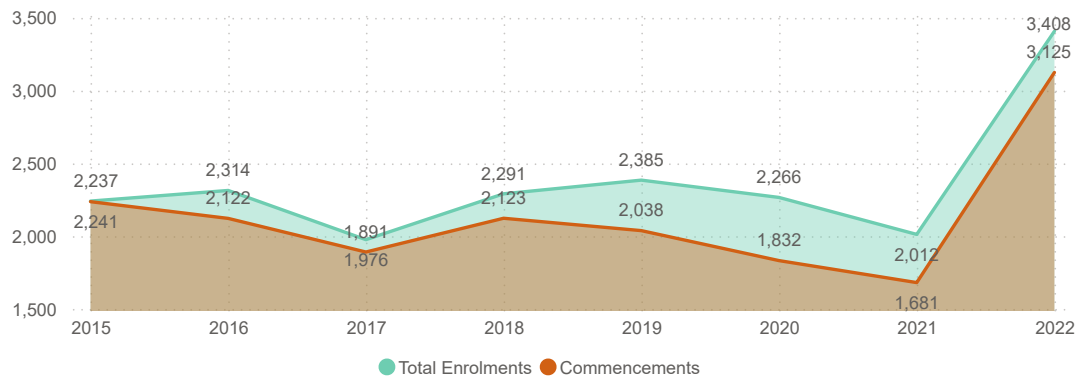
(j) Enrolments by Funding Sources



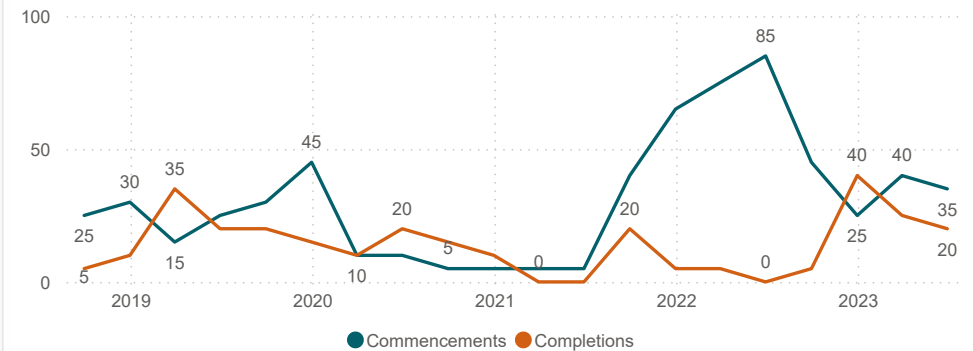
(k) Training Program Delivery Location



(l) RII Coal Mining Annual Enrolments and Commencements



(m) RII Coal Mining Apprentices and Trainees Commencements and Completions by Quarter



Sources: (i) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (j) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (k) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (l) NCVER. 2023. TVA program enrolments 2015-2022 (VOCSTATS). Adelaide, December (m) NCVER. 2023. Apprentices and trainees, Sep 2018 - Jun 2023 (VOCSTATS). Adelaide **Note:** Figure (m) Apprentices and Trainees commencements and completions are rounded to nearest 5. Figure (k) The enrolments are rounded to nearest 100.

## Coal mining workforce demographics

Australia's coal mining workforce is heavily concentrated in Queensland (54% of all workers) and New South Wales (39% of all workers), [Figure 20 \(b\)](#). ABS Labour Force data shows that the workforce is concentrated close to where coal reserves are located, which creates a large regional workforce.<sup>103</sup> The biggest regional concentrations of coal mining employment in 2021 (using census data) were in Mackay–Isaac–Whitsunday at 13,335 (up 3,380 (34.0%) from 2016), Hunter Valley at 10,056 (up 1,232 (14.0%)) and Central Queensland at 7,349 (up 679 (10.2%)).<sup>104</sup>

In such cases, coal mining becomes an important part of the social and economic fabric of local communities, with many families boasting multiple generations of coal workers. This establishment of close-knit communities near the mines themselves sets coal mining apart from most of Western Australia's metal ore mining operations, which are largely reliant on a fly-in fly-out (FIFO) workforce.

While the community cohesion created by coal mining has many positive aspects, it can make the impacts associated with mine closures more acute, as taking up similar mining roles with other organisations could well mean relocating to another community or state.

Not unlike other mining industry sectors, the coal mining workforce is being impacted by significant skills shortages. Of the industry's top 10 occupations, 8 have been identified by the 2023 Skills Priority List as experiencing a shortage, which includes all top 5 occupations, [Figure 20 \(e\)](#).<sup>105</sup> Each of the top five occupations is showing job vacancy levels significantly higher than in the pre-COVID period.<sup>106</sup> Based on JSA employment projections, these occupations are projected to grow over the coming years, adding further pressure on the industry and a workforce already experiencing unmet demand.<sup>107</sup>

The coal mining workforce underperforms when compared to other mining sectors in relation to female participation, with only 15% of its workforce represented by women, compared to 25% of the non-metallic mineral mining and quarrying workforce, 24% of the metal ore workforce and 21% of the exploration and other mining support services workforce, [Figure 23](#) and [26](#).

103 Australian Bureau of Statistics. February 2024 - *Labour Force, Australia, Detailed* - Table EQ06 – 4-quarter average.

104 Gilfillan, Geoff. 2023. *Employment trends in coal mining and the renewable energy sector*. Canberra: Parliament of Australia.

105 Jobs and Skills Australia. *'Skills Priority List'*. 2023

106 Jobs and Skills Australia. *Internet Vacancy Index*, ANZSCO4 Occupations, States and Territories – Feb 2024(4-quarter average).2024.

107 Jobs and Skills Australia. *'Employment Projections'*. 2023





Addressing this underperformance represents a significant opportunity for the coal industry to address its ongoing skills shortages and harness the proven benefits of having a diverse workforce. The mining industry's performance in relation to greater female participation is explored more deeply in the [diversified workforce](#) section of this plan.

One challenge for the coal industry, which is not dissimilar to other mining sectors, is the low proportion of the workforce that is represented by younger workers (Generation Z, aged 25 or below). [Figure 20](#) shows that the coal workforce is comprised of 8% younger workers and 7% older workers (aged 60+). In the case of coal mining, given that the total projected workforce over the coming 10 years is projected to remain largely steady, this equilibrium between new entrants and likely retirements may not cause as big an issue as is posed for other mining sectors, [Figure 21 \(h\)](#).

The coal industry's strong reliance on VET qualifications is not dissimilar to other sectors within the mining industry. The way vocational training is delivered in support of the industry is unique. [Figure 22](#) shows 100% of current vocational training related to coal-specific qualifications is conducted by private RTOs, with the vast majority (92%) being delivered under fee-for-service arrangements as opposed to government-funded initiatives. Despite the coal workforce being strongly represented in both Queensland and New South Wales, 86% of coal-specific VET enrolments were in Queensland versus only 13.5% in New South Wales. This discrepancy may be linked to different funding approaches for RII training in each state or licensing requirements and an area of focus for AUSMASA to further explore.

## Coal mining key workforce drivers

The use of coal as an energy source has long been linked to rising global temperatures, with nations globally pivoting to the use of viable alternatives. A 2021 study suggested that for the world to avoid exceeding an increase in global temperatures of 1.5 degrees Celsius, 95% of Australia's coal reserves would need to stay in the ground.<sup>108</sup>

Consequently, Australia's coal industry and workforces will come under increasing pressure as the world acts to meet climate change targets. For example, the International Energy Agency's Net Zero by 2050 Roadmap calls for no additional final investment decisions for new unabated coal plants, for the least efficient coal plants to be phased out by 2030, and to retrofit the remaining coal plants still in use by 2040.<sup>109</sup>

<sup>108</sup> Dan Welsby, James Price, Steven Pye and Paul Ekins. 2021. 'Unextractable Fossil Fuels in a 1.5°C world'. Nature 597.

<sup>109</sup> International Energy Agency, [Net Zero by 2050 - A Roadmap for the Global Energy Sector](#), released May 21.

Transitioning away from coal is complex and will take time. As the concept of a 'just transition' takes hold in the global community, greater consideration will be given to those impacted by the transition the most. Closing coal mines affects not only mine workers but also workers in related sectors and entire communities in coal-dependent regions. Crucially, many developing countries face energy shortages that disproportionately impact the poor, hindering the transition to clean energy and the phasing out of coal.<sup>110</sup> Consequently, the supply and demand dynamics for coal is uncertain. Australia is not immune from these dynamics, and our workforce and regional community challenges will require careful management through government policy and planning. Ensuring this skilled workforce is not lost and properly supported to transition to other productive parts of the economy will be a priority.

In the near term, the transition away from Australian coal-fired power stations in support of the move to a decarbonised future will have a direct impact on coal mines located close to such power stations, where the primary purpose is to supply coal for local consumption.

The Australian Government, and state and territory governments, are investing significant funds in helping communities affected by such transformation to transition to new jobs within the clean energy sector. Such initiatives will still require a large-scale re-skilling effort, with new jobs likely requiring significantly more complex and digital skills.

For those workers who are unable or unwilling to reskill and transition to new job roles, similar roles are available within other mining operations. This would undoubtedly require workers to move to the jurisdictions or metropolitan hubs from which FIFO operations are staged. In many instances, such a move would be a significant barrier, with a close connection to the community and the cost of relocation and housing in alternate locations being key factors.

The pending closure of Western Australia's Collie coal-fired power stations is a prime example of such a pending workforce transformation challenge. After the state government announced that all coal-fired power stations would be shut down by 2029, several initiatives were set in motion. The government, recognising that the move away from coal would impact upwards of 1,200 workers, announced \$200 million for the Collie Industrial Transition Fund to attract new projects and industries and \$47.8 million for training initiatives to assist with the local workforce's transition.<sup>111</sup>

<sup>110</sup> The World Bank, *For a Just Transition Away from Coal, People Must Be at the Centre*, November 2021.

<sup>111</sup> Sam Bold, Georgia Loney and Anthony Pancia. *Collie Residents React as Western Australia Gives Deadline for Coal-Fired Power Plants*. 2022



Other coal-fired power stations that are slated for closure, with a corresponding impact on coal mines that currently supply them, include Eraring Power Station (New South Wales – August 2025), Callide B Power Station (Queensland – 2028), Yallourn W Power Station (Victoria – 2028) and Vales Point B (New South Wales – 2033).<sup>112</sup>

Over the longer term, as key export markets such as China move towards non-coal energy generation, the thermal coal market will be impacted more severely. This would create a much larger displacement of coal miners.

With the surging demand for [critical minerals](#), such as lithium, there would likely be opportunities for such workforces to be retrained and re-engaged in areas of demand.<sup>113</sup> Given metallurgical coal's key role in the production of steel, the transition away from it will be more gradual. Research into alternative steel-producing technologies and techniques that do not require the use of metallurgical coal is ongoing, with the impact of such not likely to take place until the 2030s.<sup>114</sup>

*With the surging demand for critical minerals, such as lithium, there would likely be opportunities for such workforces to be retrained and re-engaged in areas of demand*

## AREA OF FOCUS

The VET sector must be ready and responsive to the future transformation of the coal industry workforce. AUSMASA will work closely with the industry to ensure that innovative and engaging training programs are available.

<sup>112</sup> Australian Energy Regulator. *State of the energy market 2023*. 2023.

<sup>113</sup> Australian Industry Energy Transitions Initiative. *Skilling Australian industry for the energy transition*. 2023.

<sup>114</sup> John Quiggin. *Getting Off Coal - Economic and Social Policies to Manage the Phase-out of Thermal Coal in Australia*. 2020





## Metal ore mining overview

Australia's rich and varied minerals endowment has attracted significant exploration and mining investment which has made Australia a world leader in mining technology, geoscience, and sustainable mining practices.

Australia has one of the most diverse metal ore production profiles in the world. Almost every major mineral is produced somewhere – iron ore in the Pilbara, tin in Tasmania, copper in South Australia and antimony in Victoria. This output is primarily export focused and just a small percentage of the mineral production remains in Australia for domestic consumption. Of the 900 million tonnes (Mt) of iron ore produced in Australia last year, over 99% was exported to our trading partners in China, Japan, and South Korea.<sup>115</sup> As a result, Australia is one of the world's largest producers of mineral and metal commodities in the world.<sup>116</sup>

The scale of Australia's metal ore mining sector cannot be overstated. In a single year the iron ore industry alone extracts, processes, and ships 4 times more rock than the entire Panama Canal construction project. While geological potential is an important part of the industry's success, such feats would not be possible but for a highly skilled workforce.

One approach to managing the recruitment challenges facing the sector has been the rise of remote or automated transportation. Such systems have deployed many cutting-edge technologies to allow haulage trucks and trains in the Pilbara to be remotely managed by operators in control rooms located in Perth. Such innovations not only support increased productivity but create new opportunities for more workforce diversity.

Australia is undoubtedly the world leader in metal ore mining and demand for the iron ore, gold, bauxite and copper we produce is unlikely to abate. The broad consensus is that even greater demand will be driven by the rising incomes of highly populated emerging economies, energy transition, and the drive for even faster, yet smaller, computing technology.

Australia's challenge is to remain competitive with the growing number of mining jurisdictions around the world that benefit from low-cost labour in building and running mining operations.

While Australia's iron ore, bauxite and more recently, lithium sectors have surged, our copper, nickel and zinc production have not grown or is lower today than they were 20 years ago, [Table 1](#).<sup>117</sup> With lower prices further challenging the viability of these key sectors within metal ore mining,

115 Department of Industry, Innovation and Science, *Resources and Energy Quarterly: December 2023*, released 18 December 2023.

116 Geoscience Australia, *Australian mineral facts*, last updated 19 April 2024

117 Geoscience Australia, *Australian Resource Reviews*, last updated 19 December 2023.



Australia needs to focus on boosting its competitiveness for mining investment through innovation and supplying a highly skilled workforce that can productively employ the latest mining technology.

The metal ore mining sector also covers the mining of mineral sands (referred to as rare Earth elements), such as ilmenite, zircon and rutile, each of which has important industrial applications such as in the production of permanent magnets utilised in wind turbines.<sup>118</sup>

While mineral sands reserves occur in every state and the Northern Territory, most operating mines are located in Western Australia (11), followed by New South Wales (2), the Northern Territory (1) and South Australia (1).<sup>119</sup>

**Table 1: Australian commodity production**

Commodity	Unit	2002-03	2012-13	2022-23	20-Year Growth	
Bauxite	Mt	54	79	99	81%	▲
Copper	kt	884	971	808	-9%	▼
Gold	t	276	245	301	9%	▲
Iron Ore	Mt	199	555	957	382%	▲
Lead	kt	695	639	516	-26%	▼
Lithium (Ore)	kt	-	417	3,088	n/a	▲
Nickel	kt	209	302	150	-27%	▼
Silver	t	1,894	1,696	1,119	-41%	▼
Tin	t	6,222	6,637	8,643	39%	▲
Uranium	t	9,172	8,954	5,409	-41%	▼
Zinc	kt	1,499	1,468	1,165	-22%	▼

Source: Department of Industry, Science and Resources, *Resources and Energy Quarterly – December 2023*. Units – Mt, megatonne; kt, kilotonne; t, tonnes

118 Resources Victoria. *Mineral Sands Exploration in Victoria*. 2022

119 Geoscience Australia. *Australian Operating Mines Map Data 2023*. 2023



# Metal ore mining demographic insights

Figure 23: Metal ore mining demographic insights

143,300

Workforce Numbers  
4 quarter average

24%

Female %

40

Median Age

8%

Age 25 or Younger

8%

Age 60 +

47%

VET Qualified

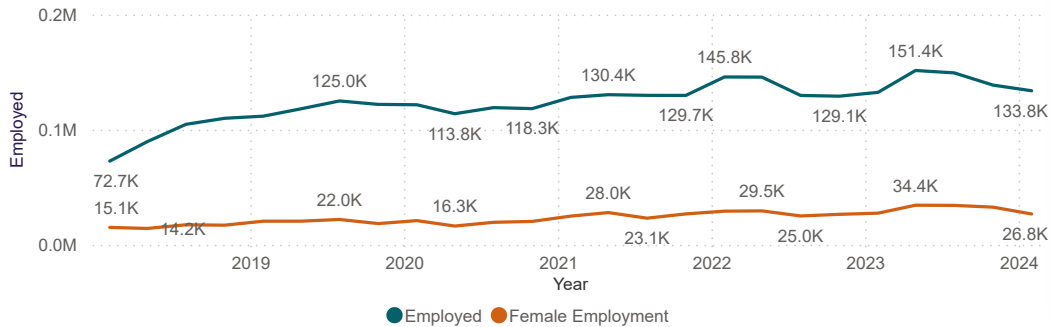
26%

Bachelor or Above

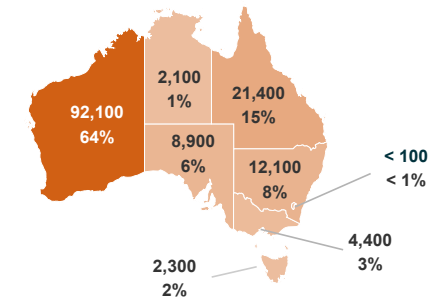
5%

First Nations

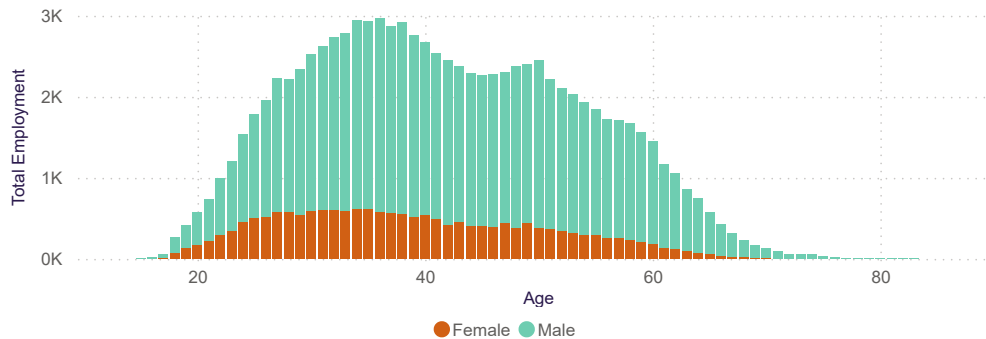
(a) Total Workforce Numbers 2018 - 2024 by Quarter



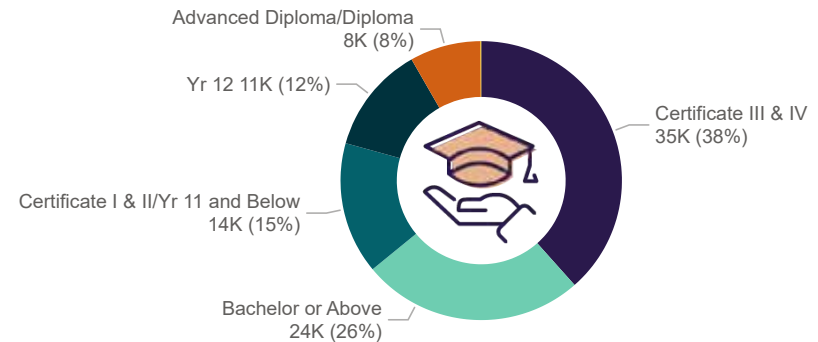
(b) Total Workforce by State/Territory, 4 quarter average



(c) Age Distribution of the Workforce



(d) Education Level of the Workforce

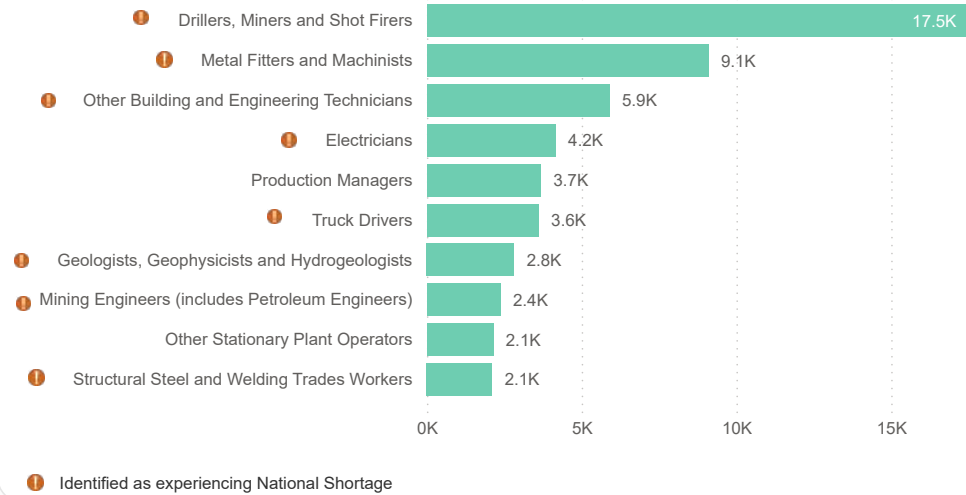


Sources: (top row) Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, Four-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 2-digit level INDP Industry of Employment (a) ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 (b) ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 (c) Census of Population and Housing (AGEP Age and SEX Sex), 2021, TableBuilder (d) Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder **Notes:** Workforce Numbers are rounded to the nearest 100.

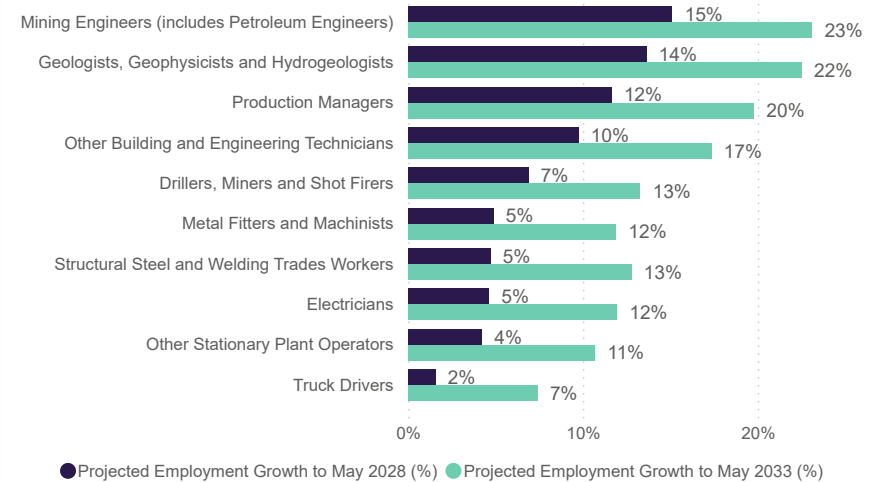
# Metal ore mining occupation insights

Figure 24: Metal ore mining occupation insights

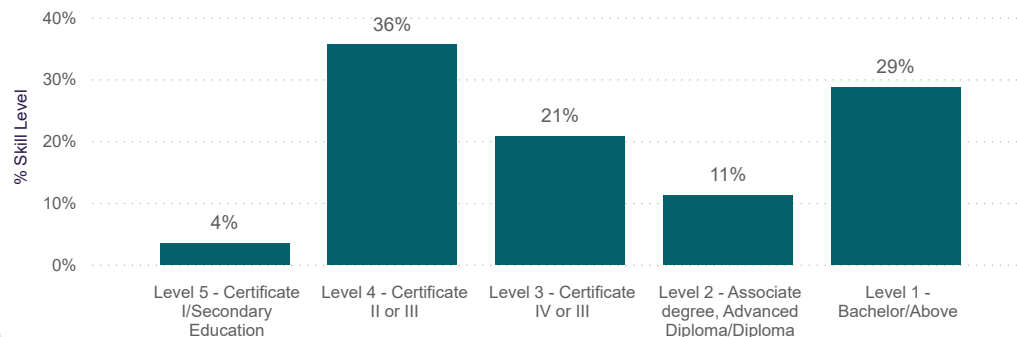
(e) Top 10 ANZSCO Occupations by Workforce Numbers



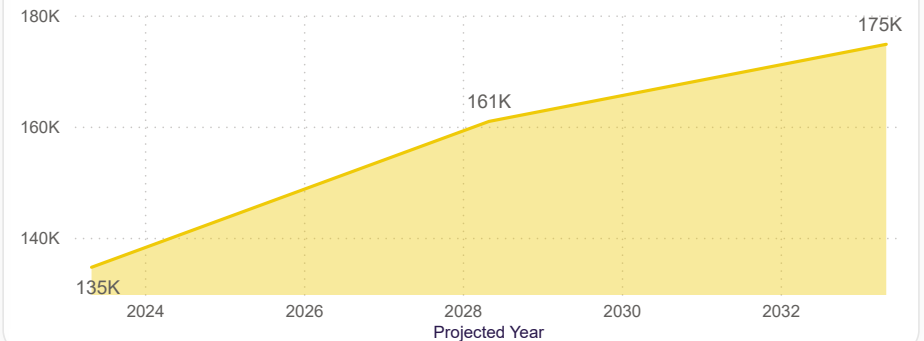
(f) Employment Projections by ANZSCO Occupations



(g) Metal Ore Mining Workforce Occupation Skill Level Commensurate with



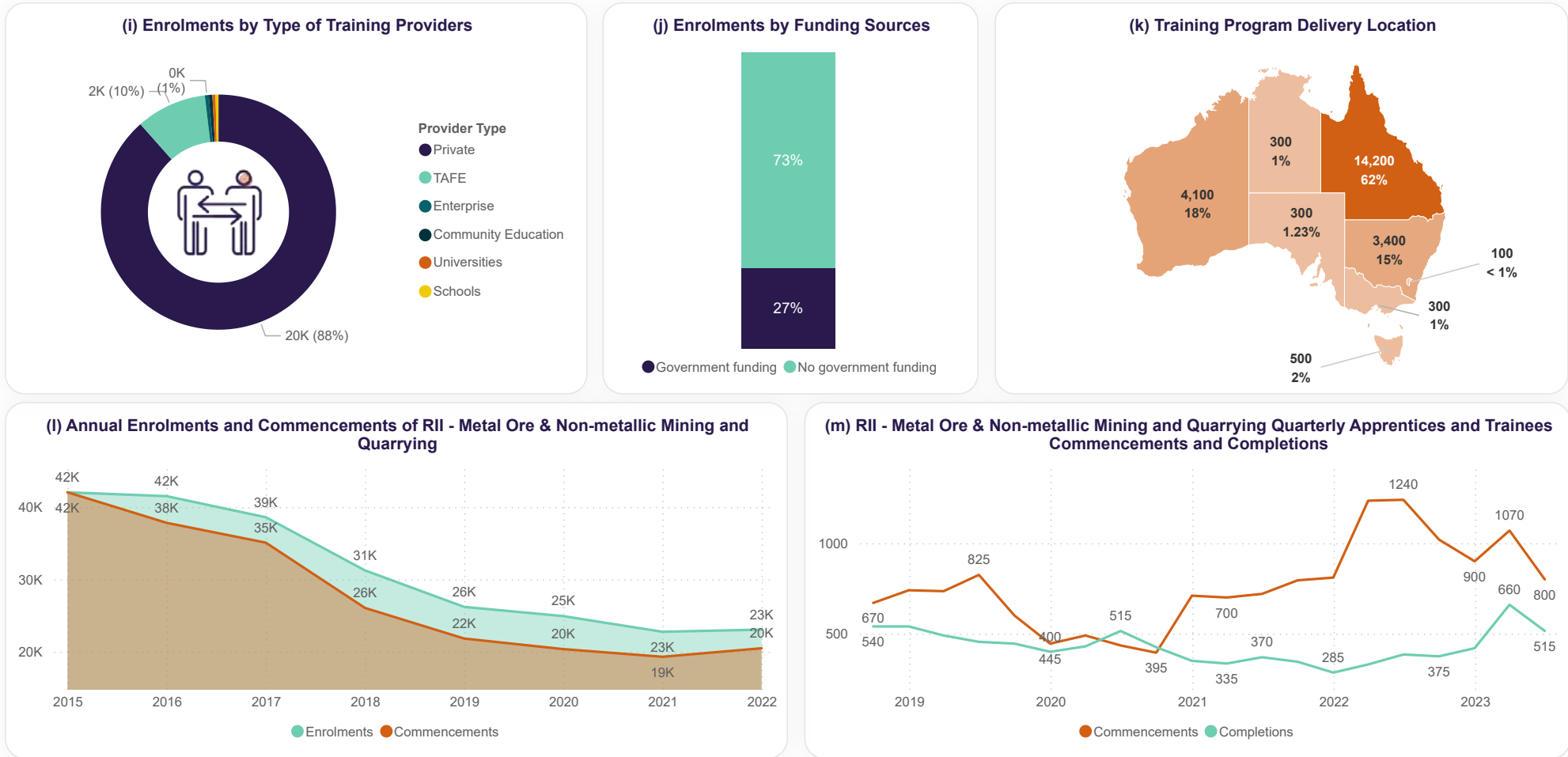
(h) Employment Projections of Metal Ore Mining



Sources: (e) ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL(ANZSCO 2013) (f) Employment Projections produced by VU for JSA (May 2023 to May 2033) (g) ABS Table Builder 2021 Census - employment, income and education (OCSKP Occupation Skill Level by INDP Industry of Employment) (h) Employment Projections produced by VU for JSA (May 2023 to May 2033)

# Metal ore mining RII metal ore & non-metallic mining and quarrying training package insights

Figure 25: Metal ore mining RII metal ore & non-metallic mining and quarrying training package insights



Sources: (i) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (j) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (k) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (l) NCVER. 2023. TVA program enrolments 2015-2022 (VOCSTATS). Adelaide, December (m) NCVER. 2023. Apprentices and trainees, Sep 2018 - Jun 2023 (VOCSTATS). Adelaide **Note:** Figure (m) Apprentices and Trainees commencements and completions are rounded to nearest 5. 2. Figure (k) The enrolments are rounded to nearest 100.

## Metal ore mining workforce demographics

The metal ore mining workforce has grown steadily, lifting from 94,200 (four-quarter average from February 2018 to November 2018) in 2018 to 143,300 in 2024, [Figure 23 \(a\)](#). This growth is not expected to abate, with JSA employment projection data pointing to a workforce size of 175,000 by 2032.<sup>120</sup>

This growth will be challenged by the existing skills shortages in the current workforce, highlighted by the fact that 8 out of the top 10 occupations by worker numbers in the sector are shown as experiencing skills shortages as reported by the 2023 Skills Priority List, [Figure 24 \(e\)](#).<sup>121</sup> These same 8 occupations are showing job vacancy rates significantly higher than pre-COVID levels.<sup>122</sup>

Metal ore mining occurs in all states and the Northern Territory. Several mining hubs have organically developed over time to take advantage of geologically rich areas— such as the Pilbara, Kalgoorlie gold fields, and Mt Isa region - and have underpinned much of the rise in demand for a skilled workforce.

Western Australia has the largest metal ore workforce, representing 64% of the industry. Queensland has almost 15% of the workforce, followed by New South Wales with just over 8%, [Figure 23 \(b\)](#).

The majority of metal ore mining takes place far from major cities and often in challenging environmental conditions characterised by extreme heat and remoteness. This is particularly the case for metal ore mining in Western Australia. To address these issues, the industry has focused on fly-in fly-out (FIFO) operations, drawing most of its workforce from the greater Perth metropolitan area and from the eastern seaboard.

FIFO has boosted the availability of workers and skills at remote mine sites and created a more mobile workforce capable of more easily transitioning from one site to another to meet changes in labour demand. It has also created a new set of social and health issues. In a 2018 study for the Western Australian Mental Health Commission, the Centre for Transformative Work Design found there was a greater risk of mental ill health among workers operating under FIFO arrangements, with one-third of the 3,000 FIFO workers surveyed experiencing high or very high levels of psychological distress.<sup>123</sup>

120 Jobs and Skills Australia. *'Employment Projections'*. 2023

121 Jobs and Skills Australia. *'Skills Priority List'*. 2023

122 Jobs and Skills Australia. *'Internet Vacancy Index'*, ANZSCO4 Occupations, States and Territories – Feb 2024(4-quarter average).2024

123 Centre for Transformative Work Design, *'Impact of FIFO work arrangements on the mental health and wellbeing of FIFO workers'*, A report for the WA Mental Health Commission, released September 2018.





Women currently make up around one-quarter (24%) of the total metal ore mining workforce. While this represents a steady improvement in female participation, it is accepted that more needs to be done to not only attract but also support a more diverse workforce. The mining industry's performance in relation to greater female participation is explored more deeply in the [diversified workforce](#) section of this plan.

One challenge for the metal ore sector, which is not dissimilar to other mining sectors, is the low proportion of the workforce that is represented by younger workers (Generation Z, aged 25 or below). [Figure 24](#) shows the metal ore workforce is comprised of 8% younger workers and 8% older workers (aged 60+). Given the projected growth that is forecast for this sector, the ability of the industry to attract more young workers to offset pending retirements and meet additional demand will be critical. The challenges of attracting new entrants to the mining industry are explored in greater detail in the [community perceptions of the mining industry](#) section of this plan.

While the metal ore mining sector is strongly reliant on VET-based qualifications (with 47% of its workforce VET qualified) the distribution of enrolments for relevant RII qualifications does not mirror the workforce distribution across states. While Western Australia has the largest proportion of the workforce (64%), it only accounts for 17.7% of RII enrolments, whereas Queensland (with almost 15% of the workforce) has 61.5% of RII enrolments. This discrepancy may be linked to different funding approaches for RII training in each state, something which will be an area of focus for AUSMASA to further explore. Across the sector, almost 90% of VET training is conducted by private RTOs, with only 27% of training benefiting from government funding to support it, [Figure 25 \(i and j\)](#).

Overall, commencements and enrolments in key RII qualifications that support the metal ore sector have been steadily decreasing since 2015, when over 42,000 students commenced and were actively enrolled. By 2022, the enrolled student population had dropped by almost half to 23,000, [Figure 25 \(i\)](#). This may become problematic as lower commencements and enrolments can lead to lower completions, as the pool of new and existing students available is reduced.

### AREA OF FOCUS

AUSMASA will conduct further research into both the unequal geographical distribution and the longer-term decline of RII qualification enrolments within the metal ore mining sector.

## Metal ore mining key workforce drivers

The focus on emissions targets, renewable energy, critical minerals, and low-emission technologies will not only change how and what is mined but also how it is processed, transported, and exported.

Evolving technologies are changing the type of resources required by the mining industry. One example, the adoption of EVs, has led to a surge in global demand for lithium, a key component in Lithium-ion batteries. Increasing demand for EVs, and by extension, the minerals that make them possible is a key focus of the National Electric Vehicle Strategy.<sup>124</sup> The growing demand for lithium-ion battery technologies implies that technological advancements in lithium extraction and processing are imperative.

The global drive towards renewable technologies is creating a surge in demand for the minerals that make such a world possible. According to research by the Minerals Council of Australia, more than 260 new lithium, cobalt, nickel, and copper mines will be required globally by 2030 if the world is to meet global demand for mineral-intensive EVs and energy storage batteries.<sup>125</sup>

Analysis from the International Energy Agency of major mines that came online between 2010 and 2019 shows that it took on average over 16 years to develop projects from discovery to first production, although the exact duration varies by mineral, location and mine type. It took more than 12 years to complete exploration and feasibility studies, and 4-5 years for the construction phase. These long lead times raise questions about the ability of supply to ramp up output if demand were to pick up rapidly.<sup>126</sup> This positions critical minerals as a key demand driver for increased access to a skilled workforce, among other things, to realise this potential.

Finally, as evidenced by the changing nature of technological applications within mining and the nature of global competition in this space, it is imperative that the mining industry and its workforce be highly efficient. As part of the [national economic settings section](#) of this workforce plan, Australia's declining productivity levels have already been flagged. The ongoing investment in training and adoption of new technologies will be key for the mining industry to remain competitive.

## Critical Minerals

Critical minerals will play a significant role in Australia's achievement of its environmental strategic and economic diversification objectives. The Department of Industry, Resources and Science (DISR) describes critical minerals as 'essential to our modern technologies, economies and national security, and whose supply chains are vulnerable to disruption'.<sup>127</sup> DISR maintains a list of critical minerals, deciding which minerals to include based on global technology needs, particularly for emission reduction, advanced manufacturing, and defence.

more than **260** new lithium, cobalt, nickel, and copper mines will be required globally by **2030** if the world is to meet global demand for mineral-intensive EVs and energy storage batteries

<sup>124</sup> Department of Climate Change, Energy, the Environment and Water. *National Electric Vehicle Strategy*. 2023.

<sup>125</sup> Minerals Council of Australia. *Future Critical: Meeting the Minerals Investment Challenge*. 2023.

<sup>126</sup> International Energy Agency. *The Role of Critical Minerals in Clean Energy Transitions - Reliable supply of minerals*. March 2022

<sup>127</sup> Department of Industry, Science and Resources. *Critical Minerals Strategy 2023–2030*. 2023.

The global demand for critical minerals has further highlighted the challenges that Australian miners face when competing against miners from other countries. Indonesia, for example, has invested heavily in its ability to mine and process large volumes of nickel at prices significantly lower than Australian miners.<sup>128</sup> Using a technology called High-Pressure Acid Leaching (HPAL), Indonesian refined nickel produces over 3 times more carbon emissions than Australian nickel, leading some in the industry to label Indonesian nickel as 'dirty nickel'.<sup>129</sup> Australia's 'green advantage' for its nickel has not yet fully protected it from the market's pricing response.

This surge in supply has seen nickel prices drop by 51% since early 2022.<sup>130</sup> Equally, the increased global supply of lithium has seen the price for lithium hydroxide drop by similar amounts since its peak in December 2022.<sup>131</sup> Such pricing volatility speaks to the turbulent trading conditions that often underpin the reality of Australia's mining industry. The impact on the industry, and by extension its workforce, has been swift. Since September 2023 5 nickel mines have closed, reducing domestic production by 33% and placing a further 31% at risk.<sup>132</sup> These closures have directly displaced 1,000 workers<sup>133</sup>, with a further 3,300 at risk after BHP recently advised that it is considering the future of its Nickel West operations.<sup>134</sup> The Chamber of Minerals and Energy of Western Australia (CME) predicts that up to 10,000 workers are at risk due to the current challenges faced by the nickel industry.<sup>135</sup>

*The Chamber of Minerals and Energy of Western Australia (CME) predicts that up to 10,000 workers are at risk due to the current challenges faced by the industry*

With ongoing skills shortages and the broader metal ore industry continuing to expand, most of the workers currently affected by job losses are likely to find new employment opportunities within the sector. If job losses were to increase to the scale warned of by the CME, the impact would be much more severe. Equally, job losses in mining jurisdictions that are not as heavily concentrated as the likes of Western Australia are likely to be harder to absorb. This has been the case in Tasmania, where 200 workers lost their jobs after the closure of the Avebury nickel mine. Other mines in the area indicated that they could absorb some of the displaced workers, but not all.<sup>136</sup>

## Critical Minerals Strategy 2023–2030

The adoption of critical minerals in Australia over the next decade is poised to be significantly influenced by the country's commitment to environmental sustainability and renewable energy. The Australian Government's Critical Minerals Strategy 2023–2030 is a comprehensive framework that aims to position Australia as a global leader in the critical minerals sector.

128 Chamber of Minerals and Energy of Western Australia. *A Critical Juncture – Australia's Opportunities and Challenges in Nickel*. 2024.

129 The Sydney Morning Herald. Boardrooms, top investors blindsided by nickel crash. 2024.

130 Chamber of Minerals and Energy of Western Australia. *A Critical Juncture – Australia's Opportunities and Challenges in Nickel*. 2024.

131 Department of Industry, Science and Resources. *Resources and energy quarterly: December 2023*. 2023

132 Chamber of Minerals and Energy of Western Australia. *A Critical Juncture – Australia's Opportunities and Challenges in Nickel*. 2024.

133 The Sydney Morning Herald. Boardrooms, top investors blindsided by nickel crash. 2024.

134 The West Australian. *BHP stands down contractors at Kalgoorlie nickel smelter*. 2024.

135 Chamber of Minerals and Energy of Western Australia. *A Critical Juncture – Australia's Opportunities and Challenges in Nickel*. 2024.

136 The Advocate. *West Coast mining company reaches out to displaced Avebury mine workers*. 2024



The global shift towards low emissions and renewable energy will correspondingly reduce the demand for fossil fuel-intensive exports, such as thermal coal. This transition underscores the importance of critical minerals in Australia’s future economic landscape as well as the need for appropriate training strategies to help affected workforces realise those opportunities.

To support this, Australia has a defined list of critical minerals, shown in [Table 2](#). It’s important to note that, despite not classifying copper as a critical mineral, which contradicts the perspective of numerous industry stakeholders, various countries, and the International Energy Agency, the Government did make a significant update in December 2023. They introduced a Strategic Materials List alongside the update to the Critical Minerals List. This new list is designed to acknowledge the vital role that certain materials play in the global move towards net-zero emissions and in other strategic areas, as well as the demand for these materials from international partners. The Strategic Materials List includes aluminium, copper, phosphorous, tin, and zinc.

**Table 2: Australia’s Critical Minerals List**

Critical mineral	Australian geological potential	Australian economic demonstrated resources (2022)	Australian production (2022)	ANZSIC Class
High-purity Alumina	High	HPA ore: 16,700 kt	0	0802
Antimony	Moderate	139.4 kt	2.3 kt	0809
Arsenic	Moderate	No data	No data	
Beryllium	Moderate	No data	No data	0809
Bismuth	Moderate	No data	No data	0809
Chromium	Moderate	0	0	0809
Cobalt	High	1,742 kt	5.8 kt	0809
Fluorine	Moderate	343 kt	0	0990
Gallium	High	No data	No data	-
Germanium	High	No data	No data	-
Graphite	Moderate	8,500 kt	0	0990
Hafnium	Moderate	14.5 kt	No data	-
Indium	Moderate	No data	No data	-
Lithium	High	7,046 kt	75 kt	0990
Magnesium	High	Magnesite: 284,000 kt	Magnesite: 500 kt	0990
Manganese	High	Manganese ore: 496,000 kt	Manganese ore: 4,500 kt	0809
Molybdenum	Moderate	687 kt	0.28 kt	0809
Nickel	High	24.1 Mt	0.15 Mt	0806
Niobium	Unknown (interpreted moderate)	216 kt	No data	-
Platinum-group elements	Moderate	359.3 t	0.492 t	0809
Rare-earth elements	High	5,700 kt	16 kt	0990
Rhenium	Unknown (interpreted moderate)	157 t	No data	-
Scandium	High	36.65 kt	0	-
Selenium	Unknown (interpreted moderate)	No data	No data	-
Silicon	High	No data	No data	-
Tantalum	High	110 kt	0.1 kt	0809
Tellurium	Unknown (interpreted moderate)	No data	No data	-
Titanium	High	Ilmenite: 303,300 kt	Ilmenite: 700 kt	0805
Tungsten	High	568 kt	0.23 kt	0809
Vanadium	High	8,510 kt	0	0809
Zirconium	High	Zircon: 88,300 kt	Zircon: 500 kt	0805

Source: Department of Industry, Science and Resources. Australia’s Critical Minerals List. 2023.

In response to specific issues with Indonesian refined nickel, the federal government also amended the Critical Minerals List to include nickel, thereby giving nickel miners the opportunity to access financing under the \$4 billion Critical Minerals Facility and critical minerals-related grant programs such as the International Partnerships Program (\$40 million).<sup>137</sup> In the 2024–2025 Budget the Government committed \$7.1 billion over 11 years for critical minerals, with almost all (an estimated \$7.0 billion) of this funding set aside for a new Critical Minerals Production Tax Incentive.<sup>138</sup> While consultation on the final settings and details are yet to take place, the proposed 10% tax offset for ‘eligible processing costs’ could provide important support for the critical minerals workforce and bring on-stream additional supply, refining, and processing capacity over time.<sup>139</sup>

## Critical Minerals Workforce

The Critical Minerals Strategy is a multi-faceted approach that not only aims to make Australia a key player in the global critical minerals market but also addresses broader social and environmental goals, which will likely facilitate the adoption of critical minerals by both the public and industry. It has far-reaching implications for the Australian labour market and energy and VET sectors, promising sustainable growth and global competitiveness.

The strategy aims to address skills shortages in key professions, such as mining engineers, hydrogeologists, metallurgists, and geologists, while supporting 10,000 apprentices to enter the clean energy sector through the Government’s \$105.1 million New Energy Apprenticeship and New Energy Skills Programs.<sup>140</sup> The strategy focuses on workplace safety, culture, and flexibility to attract a diverse workforce, as well as environmental, social and governance credentials, including sharing benefits with First Nation communities and promoting gender equality.

Critical minerals will continue to play an important and growing role in achieving the world’s progression to a decarbonised future. As technologies change, the demand for different minerals will change accordingly.

Irrespective, a clear prerogative for the critical minerals sector, something which is echoed by the Critical Minerals Strategy, is the importance of greater onshore refining and beneficiation of the ores produced. As part of the CSIRO’s recent webinar ‘*Critical minerals and the energy transition*’, it was made clear that, unlike minerals such as iron ore or bauxite, where most of the value is already realised at the basic ore stage of processing,

<sup>137</sup> Hon. Madeleine King MP – Media Releases. *Nickel placed on critical minerals list*. 2024

<sup>138</sup> Commonwealth of Australia. *Budget 2024–2025 Budget Measures, Budget Paper No. 2*. 2024.

<sup>139</sup> Department of Industry, Science and Resources. *Investments to capitalise on Australia’s critical minerals and the global clean energy transition*. 2024.

<sup>140</sup> Department of Industry, Science and Resources. *Critical Minerals Strategy 2023–2030*. 2023.



with critical minerals the true value is achieved further down the value chain, requiring more processing and refining to attain.<sup>141</sup>

Critical mineral mining requires access to the full breadth of existing mining industry occupations. The strategy's call for greater onshore refining and processing capabilities represents a new demand driver for skilled roles that may not currently exist within the mining workforce. Equally, increased onshore processing of critical minerals is likely to also drive demand for new skills in supporting industries such as manufacturing.

The need to support the development of such a processing capability and its workforce, and to identify any existing skills gaps as a matter of priority is highlighted in both Queensland and Western Australia's own respective critical mineral strategies.<sup>142</sup>

The ability to produce accurate, critical mineral industry workforce statistics utilising the ANZSIC structure is problematic as the combined list of minerals classified as critical minerals are captured across multiple ANZSIC classes, groups and sub-categories, [Table 2](#). These classes, groups and sub-categories often also include other resource types that are not critical minerals. Of note is the fact that lithium, a metal, is not covered by ANZSIC's metal ore group, but rather included as part of the non-metallic mineral and quarrying group.

### AREA OF FOCUS

Given the significant implications critical minerals will have on Australia's mining and economic future, AUSMASA proposes that the ABS consider creating a new ANZSIC code. This initiative will facilitate and allow accurate workforce planning data to be produced quarterly through the ABS's Labour Force survey.

### AREA OF FOCUS

A key priority for AUSMASA will be to work closely with industry and relevant government bodies in identifying any skills gaps within the current workforce and emerging skills required to assist in making these critical mineral strategies a reality. A particular focus will be on determining if current processing-related qualifications will be fit for purpose in relation to onshore refining and processing of critical minerals.

<sup>141</sup> CSIRO. Webcast – *Critical minerals and the energy transition*. 2024.

<sup>142</sup> Department of Jobs, Tourism, Science and Innovation. 2020. Strategy Update: Western Australia's Future Battery and Critical Minerals Industries. Perth: Government of Western Australia; Department of Resources. 2023. Queensland Critical Minerals Strategy. Brisbane: Government of Queensland.

## Non-metallic mineral and quarrying overview

With approximately 1,900 quarries in Australia, the quarrying industry is an important part of Australia's resources landscape, supplying key raw materials such as stone, sand, gravel, limestone, and gypsum in support of the building and construction industry. These materials are used in the construction of roads, houses, and commercial infrastructure.<sup>143</sup> The processing of quarried raw material is generally limited to crushing and screening activities.

While the quarrying industry has similar job roles to those found in coal and metal ore mining, such as mobile plant operators, production managers and maintenance staff, there are some unique aspects to the industry that represent both opportunities and challenges. Of note, most quarries are much smaller operations when compared to metallic ore mining. Of the almost 1,900 quarries in Australia, 57% do not employ any staff (being owner-operators), while another 23% employ only one to 4 staff.<sup>144</sup>

Demand for roles in the quarrying industry is directly related to the demand for the products they help to produce. Given that most quarried material supports the building and construction sector, it is the demand of those industries that offers insight into this industry's future growth potential. It is worth noting that the building and construction industry in Australia is coming off a volatile period that was impacted by rising interest rates, supply chain disruption and the erosion of profit; however, a period of recovery and growth is forecast for 2024–28.<sup>145</sup>

The Non-metallic mineral and quarrying ANZSIC group cover lithium and graphite mining, which are both recognised as critical minerals. There are 7 operating lithium mines in Australia, with 6 in Western Australia and one in the Northern Territory.<sup>146</sup> This report's section on Critical Minerals provides further detail on the difficulties of reporting accurate workforce data that focuses on just critical minerals, as many of them are dispersed across multiple ANZSIC classes and groups.

143 Australian Bureau of Statistics. *Counts of Australian Businesses, including Entries and Exits*. 2023

144 Australian Bureau of Statistics. *Counts of Australian Businesses, including Entries and Exits*. 2023

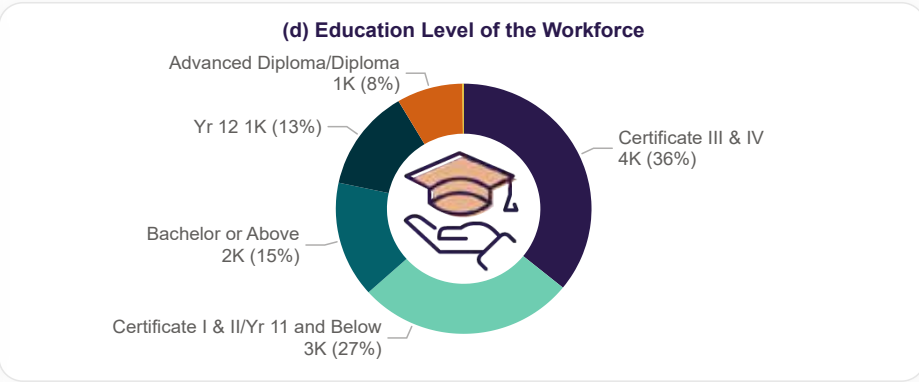
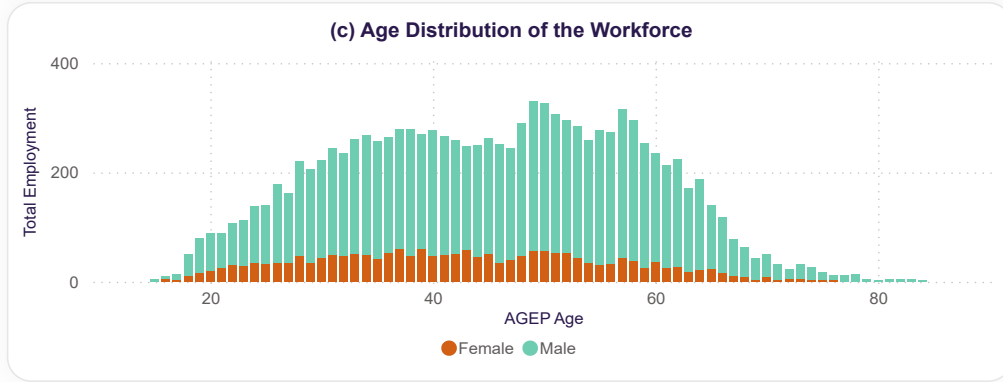
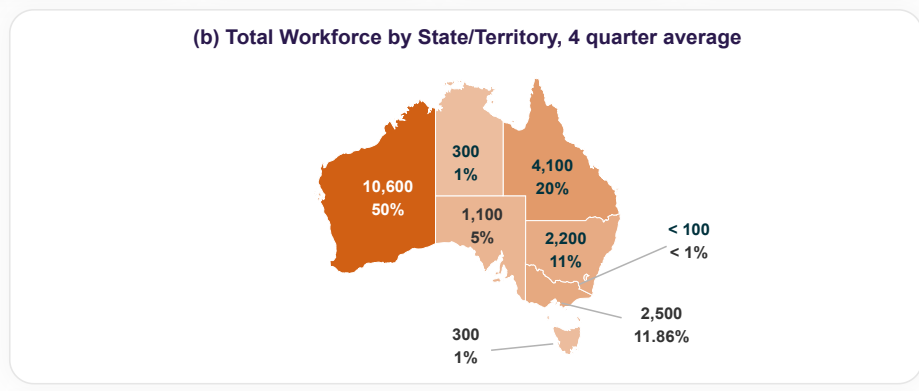
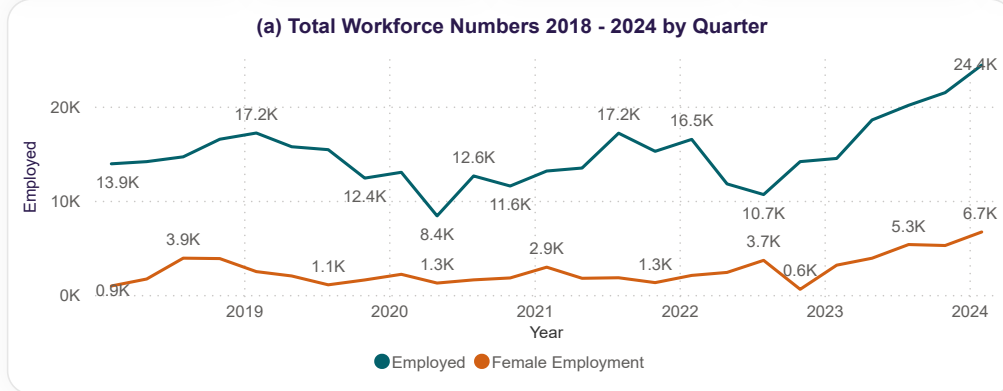
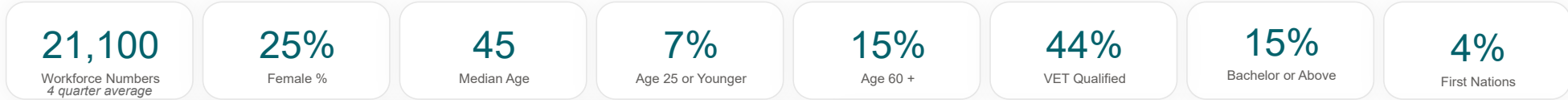
145 A. Kelly. 2023. *Construction in Australia*. IBISWorld.

146 Geoscience Australia. *Australian Operating Mines Map Data 2023*. 2023



# Non-metallic mineral and quarrying workforce demographics insights

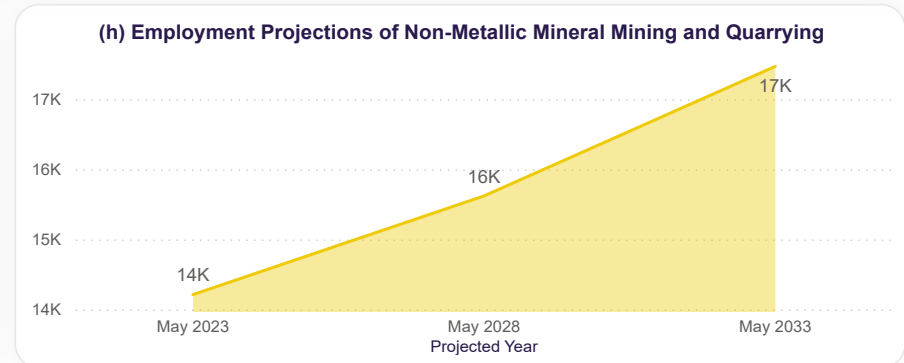
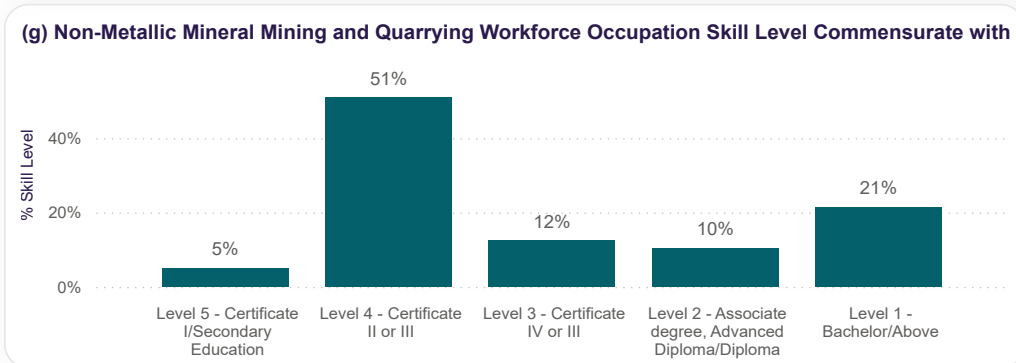
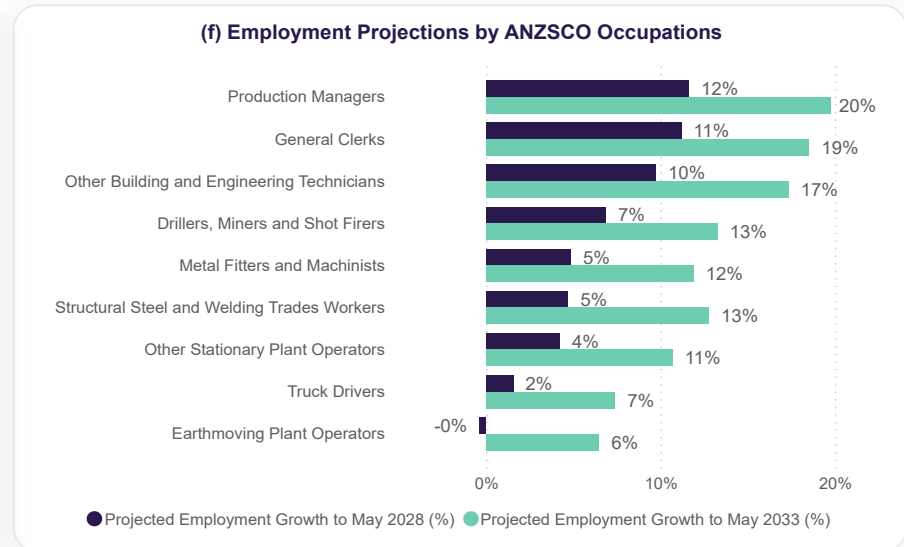
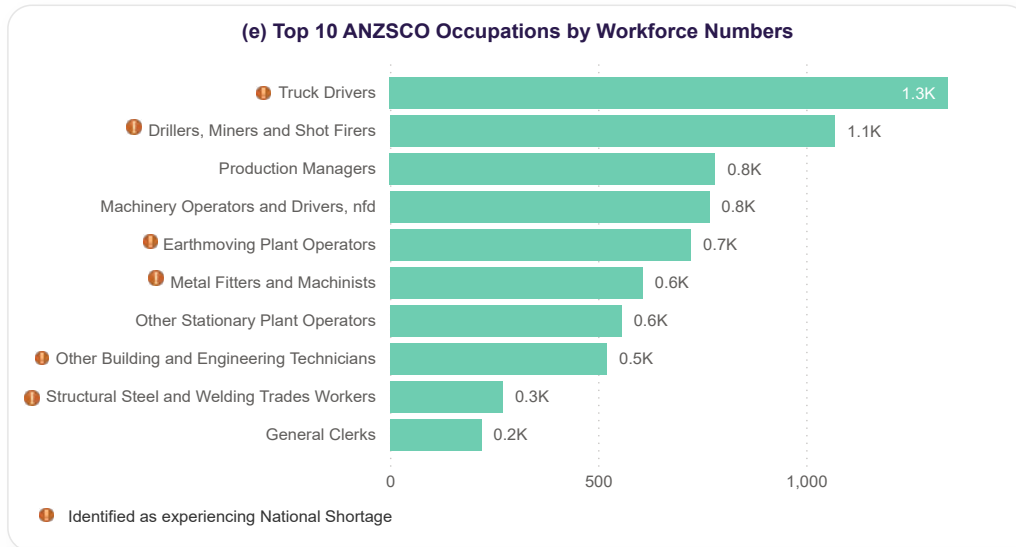
Figure 26: Non-metallic mineral and quarrying workforce demographics insights



Sources: **(top row)** Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, Four-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 2-digit level INDP Industry of Employment **(a)** ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 **(b)** ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 **(c)** Census of Population and Housing (AGEP Age and SEXP Sex), 2021, TableBuilder **(d)** Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder **Notes:** Workforce Numbers are rounded to the nearest 100.

# Non-metallic mineral and quarrying workforce occupation insights

Figure 27: Non-metallic mineral and quarrying workforce occupation insights



Sources **(e)** ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL(ANZSCO 2013) **(f)** Employment Projections produced by VU for JSA (May 2023 to May 2033) **(g)** ABS Table Builder 2021 Census - employment, income and education (OCSKP Occupation Skill Level by INDP Industry of Employment) **(h)** Employment Projections produced by VU for JSA (May 2023 to May 2033)

**Notes:** The Non-metallic mineral and quarrying sector shares VET qualifications with Metal Ore mining sector. Please refer figure 24 for VET insights.

## Non-metallic mineral and quarrying workforce demographics

The non-metallic mineral and quarrying workforce experienced a strong period of growth, from 13,300 (four-quarter average, February 2022 to November 2022) to 21,100 (four-quarter average, May 2023 to February 2024)<sup>147</sup>.

This rapid growth has had an effect on employment as of February 2024 which has already exceeded JSA's 2028 Employment Projection by around 5,000 workers, [Figure 27 \(h\)](#).<sup>148</sup> This growth in workforce size is likely correlated to the increase in lithium and mineral sands operations, especially in Western Australia.

*Rapid growth has had an effect on employment as of February 2024 which has already exceeded JSA's 2028 Employment Projection by around 5,000 workers.*

Given that the type of occupations employed by the non-metallic mineral and quarrying sector closely mimics that of the metal ore sector, it is not surprising that both sectors are experiencing similar skills shortages. Of the sector's top 10 occupations by number of workers, 7 are identified by the 2023 Skills Priority List as experiencing a national shortage.<sup>149</sup>

Key occupations for this sector, such as truck drivers and drillers, miners and shot firers are all showing national vacancy levels consistently above those experienced prior to the COVID pandemic, highlighting the strength with which the industry has rebounded.<sup>150</sup>

While the distribution of quarries (and by extension its workforce) is closely correlated to urban and regional centres, lithium mining is heavily focused on Western Australia (86% of all operating mines), which has concentrated this sector's workforce in that state (50% of workforce in Western Australia), [Figure 26 \(b\)](#).

In addition to their broad distribution across the country, quarries tend to be located much closer to urban areas than large-scale coal and metalliferous mining operations. Quarried materials are heavily consumed by the building and construction industry, making proximity to these activities important.

This geographic relationship to population centres offers employment access to the extractive resources industry without necessarily requiring either a commitment to a FIFO lifestyle or relocation to a population hub associated with major mining operations.

*Of the sector's top 10 occupations by number of workers, 7 are identified by the 2023 Skills Priority List as experiencing a national shortage*

[Figure 26](#) shows that the non-metallic mineral and quarrying sector has the highest proportion of female employees within the overall mining industry, at 25%.

A significant demographical challenge for the sector is its aging workforce. With a median age of 45, the sector has the oldest workforce within the mining industry. More worrying is the fact that the proportion of the workforce (15%) that is approaching

147 Australian Bureau of Statistics. February 2024 - *Labour Force, Australia*, Detailed - 'Table EQ06'.

148 Jobs and Skills Australia. *'Employment Projections'*. 2023

149 Jobs and Skills Australia. *'Skills Priority List'*. 2023

150 Jobs and Skills Australia. *Internet Vacancy Index*, ANZSCO4 Occupations, States and Territories – Feb 2024(4-quarter average).2024

retirement (60+) is more than double the proportion of younger workers (<25) working in the industry (7%). This trend alone, if not addressed, has the potential to place significant strain on the sector's ability to meet the growing workforce demands currently being exhibited, [Figure 28](#).

Not dissimilar to the metal ore mining sector, the non-metallic mineral and quarrying sector strongly relies on vocational education and training, but a lower reliance on higher education. Given the sector's use of key qualifications closely mimics those used by the metal ore sector, it is difficult to distinguish enrolment statistics between the 2 sectors.

## **Non-metallic mineral and quarrying key workforce drivers**

While the occupations required for the non-metallic mineral and quarrying workforce are closely aligned to those in the metal ore and coal mining sectors, they tend to occur within much smaller operations (except for lithium mining, whose characteristics are more closely aligned to the metal ore mining sector workforce). As far as the quarrying workforce is concerned, this creates both opportunities and challenges.

Smaller quarrying operations may present a more close-knit working environment, which is likely to be closer to metropolitan or key regional locations and is unlikely to require shift work. Equally, it is possible that by employing fewer staff, more opportunities present themselves to be cross trained across multiple disciplines, such as mobile plant operations or processing. Of course, the opposite could also be true, whereby smaller operations may offer fewer advancement or up-skilling operations.

Either way, one of the quarrying industry's key workforce retention challenges is the potential loss of workers either to the coal and metal ore mining sector or the construction industry (especially civil). While the industry cannot necessarily compete with the wages paid by larger mining operations, it should focus on the unique aspects that it does offer to appeal to workers who are attracted to these differences.

The ability of the industry to attract new workers to counter its aging workforce will be key. In addition to continuing efforts to promote this sector to younger workers – including as a potential stepping stone to larger mining or civil opportunities – an exploration of how the sector could promote itself to experienced mining workers wanting to 'step down' from larger mining operations, especially if they involve shift work and FIFO requirements, could also be warranted.



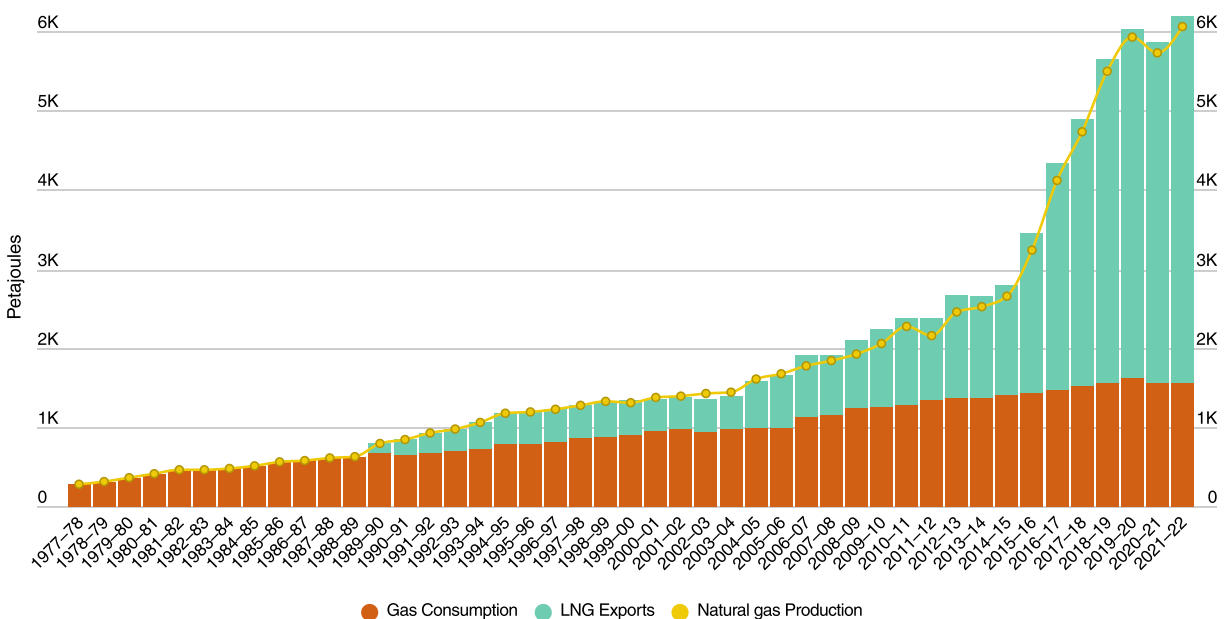


# Oil and Gas Extraction Overview

Not unlike the broader mining industry, the Oil and Gas Extraction industry provides significant economic benefits to Australia on the back of a relatively small, but highly skilled, workforce. The combined value of the oil and gas industry was \$130 billion in 2023, with gas (both natural and coal seam) accounting for 87% of that value.<sup>151</sup>

Australia’s gas production, and export, has grown significantly from the 1980’s, when production was focused on meeting local consumption demand. Today, Australia is one of the world’s leading exporters of Liquefied Natural Gas (LNG), ranking second after Qatar in 2022.<sup>152</sup> Oil production, and exports, are significantly lower, requiring Australia to remain a net importer of this energy source.<sup>153</sup>

**Figure 28: Gas production, consumption and export (LNG)**



Source: Department of Climate Change, Energy, the Environment and Water (2023), Australian Energy Statistics, Table C, Table J  
 Note: Consumption data includes statistical discrepancies.

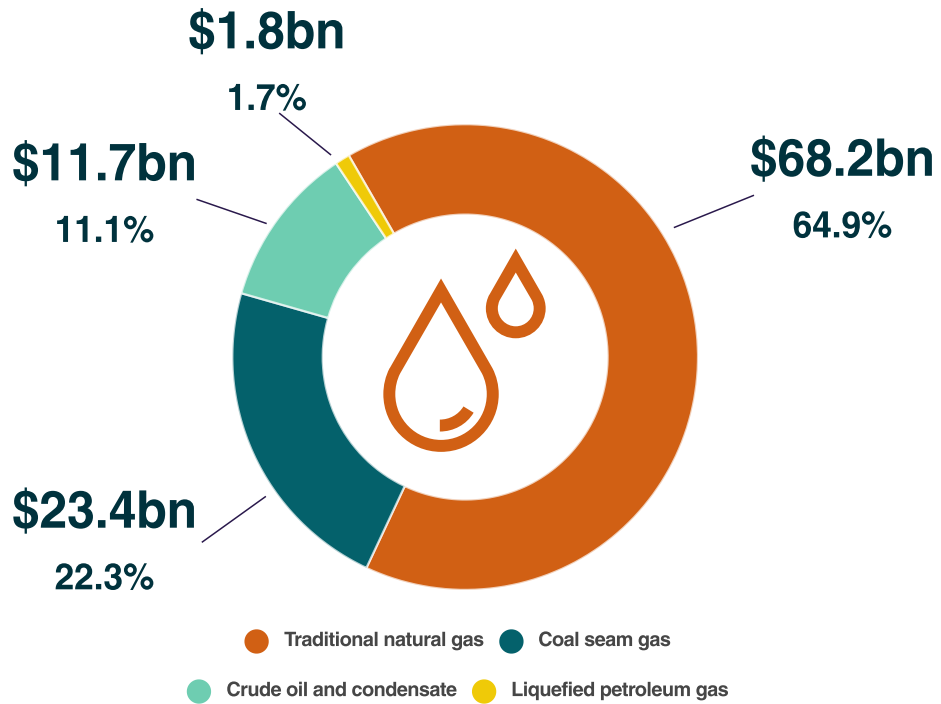
The oil and gas industry is highly vertically integrated with operations supporting the exploration, extraction, refining and transportation (for both domestic and export purposes) functions.<sup>154</sup>

ANZSIC’s inclusion of oil and gas activities under Division B (Mining) are focused on upstream activities (exploration, drilling and extraction), whilst the refining and transportation are covered by the manufacturing and transportation divisions.

Oil and gas extraction activities occur both offshore (within Australia’s exclusive economic zone EEZ) and onshore. The bulk of Australia’s offshore oil and gas platforms are located off the coast of Western Australia, with substantial activity also continuing in the Bass Strait between Victoria and Tasmania.<sup>155</sup>

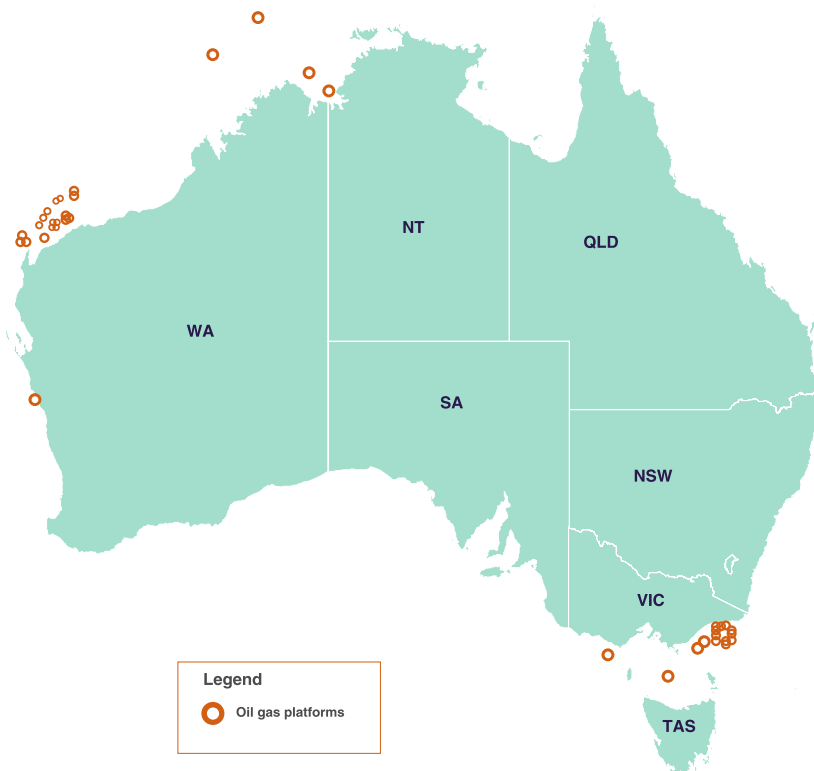
151 IBISWorld. *Oil and Gas Extraction in Australia - Market Size (2008–2030)*. 2024.  
 152 Statista. *Leading exporting countries of liquefied natural gas worldwide in 2022*. 2024.  
 153 Geoscience Australia. *Oil*. 2021.  
 154 IBISWorld. *Industry at a glance*. 2024.  
 155 Geoscience Australia. *Oil*. 2021.

Figure 29: Oil and Gas Extraction Value by Resource Type



Source: IBIS World. B0700 - Oil and Gas Extraction in Australia.2024

Figure 30: Location of offshore oil and gas platforms



Source: Geoscience Australia. Gas, 2023

About 93 per cent of identified conventional gas resources are located offshore along the North West Shelf of Australia.<sup>156</sup> Based on 2021 production rates, the estimated life for Australia's identified conventional gas resources is 41 years if all identified contingencies to development are mitigated, which includes 18 years of reserves life.<sup>157</sup>

Coal seam gas (CSG) is expected to remain Australia's most important unconventional gas resource in the near term. CSG is already a major source for domestic gas and LNG exports in eastern Australia. Almost all reported CSG reserves and contingent resources are located in Queensland; the remainder are in New South Wales.<sup>158</sup> Based on 2021 production rates, these identified CSG resources would have an estimated life of 36 years if all identified contingencies to development are mitigated, which includes 18 years of reserves life.<sup>159</sup>

There are 19 potential new projects in the pipeline over the next five years, of which 15 are new developments.<sup>160</sup> Their combined value would inject an additional \$80 billion into Australia's engineering, construction and related industries by 2028, and would require nearly 4,000 new production workers in the natural gas industry to operate them over the long term.<sup>161</sup> 10 of these new projects are in Western Australia, with the remainder split across the remaining states and territories.<sup>162</sup>

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156 Geoscience Australia. *Gas*. 2023.

157 Geoscience Australia. *Australia's Energy Commodity Resources*. 2023.

158 IBISWorld. *Industry at a glance*. 2024.

159 Geoscience Australia. *Australia's Energy Commodity Resources*. 2023.

160 Australian Resources and Energy Employer Association. *Resources and Energy Workforce Forecast (2023-2028)*. 2023.

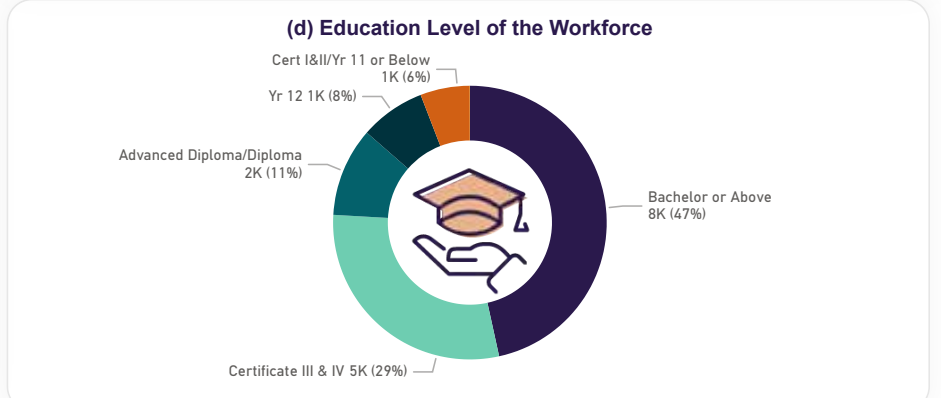
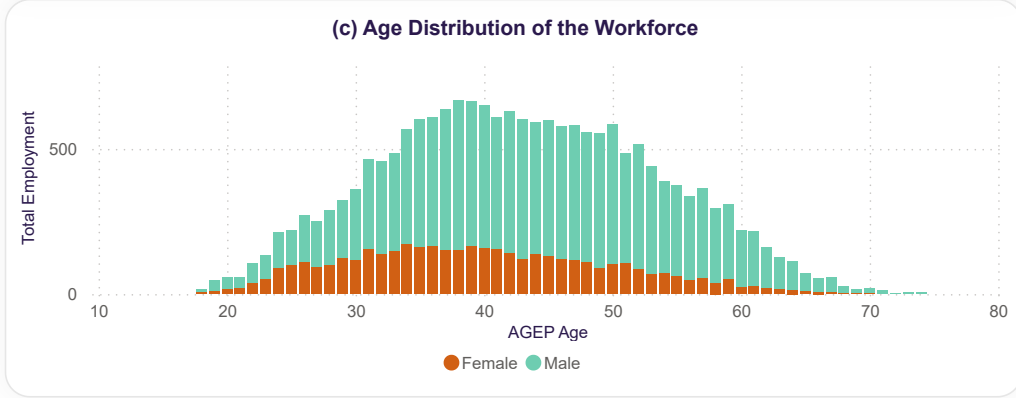
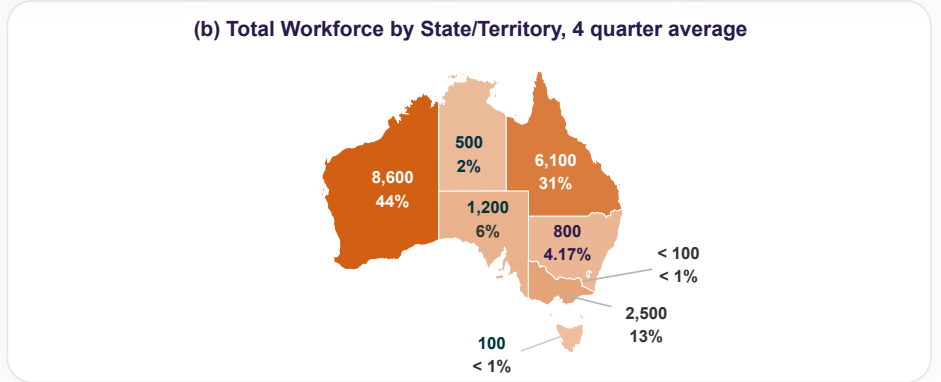
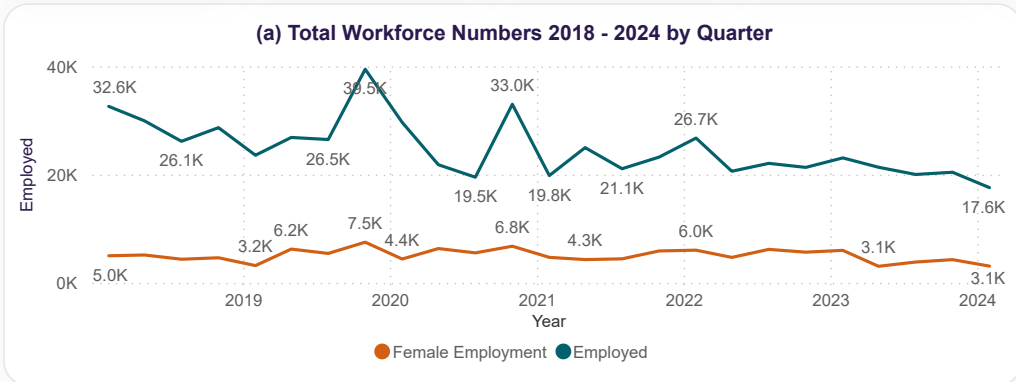
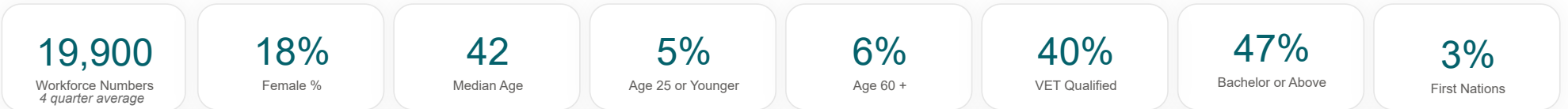
161 Australian Resources and Energy Employer Association. *Resources and Energy Workforce Forecast (2023-2028)*. 2023.

162 Australian Resources and Energy Employer Association. *Resources and Energy Workforce Forecast (2023-2028)*. 2023.



# Oil and gas extraction workforce demographic insights

Figure 31: Oil and gas extraction workforce demographic insights

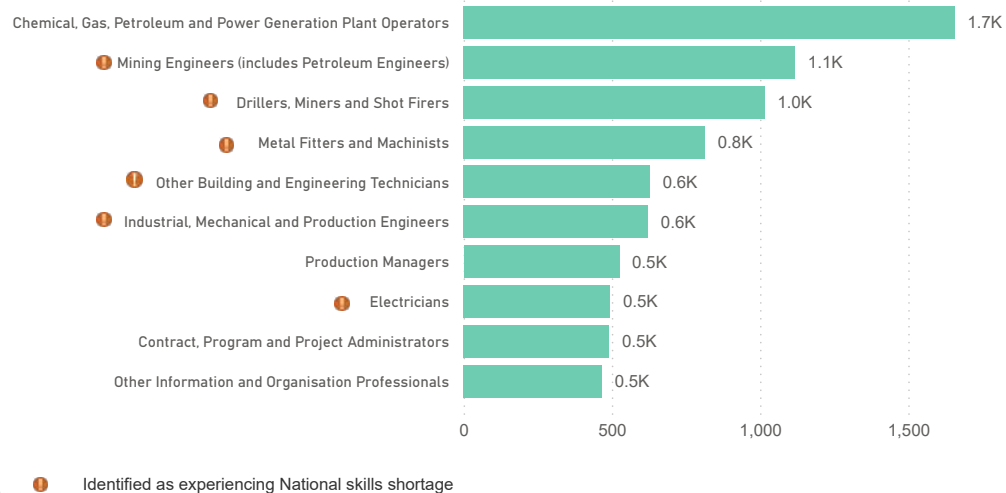


Sources: **(top row)** Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, Four-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 2-digit level INDP Industry of Employment **(a)** ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 **(b)** ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 **(c)** Census of Population and Housing (AGEP Age and SEXP Sex), 2021, TableBuilder **(d)** Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder. Notes: Workforce Numbers are rounded to the nearest 100.

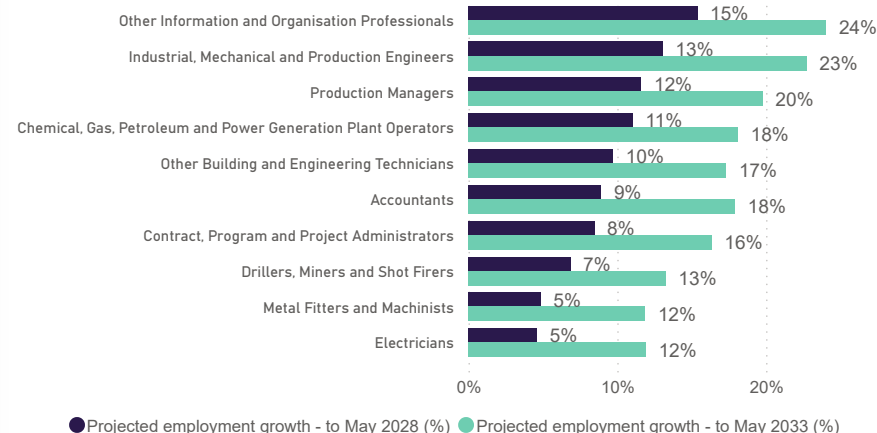
# Oil and gas extraction workforce occupation insights

Figure 32: Oil and gas extraction workforce occupation insights

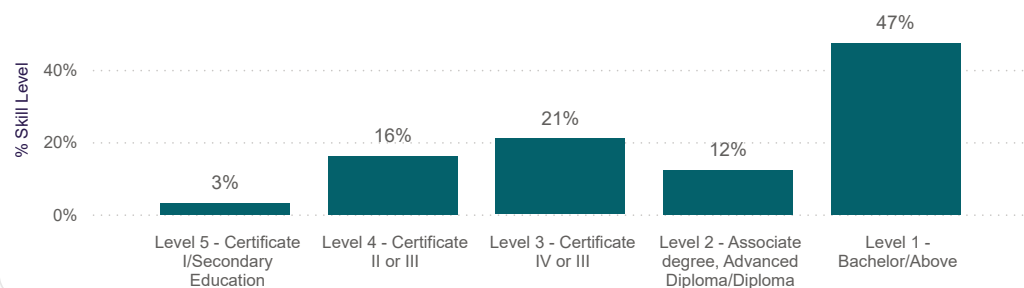
(e) Top 10 ANZSCO Occupations by Workforce Numbers



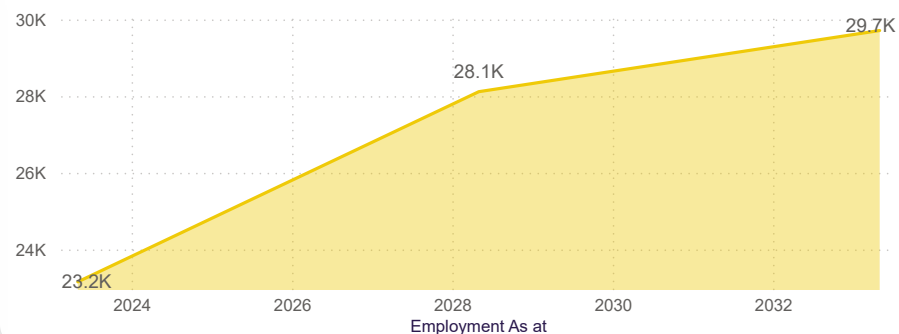
(f) Employment Projections by ANZSCO Occupations



(g) Oil and Gas Extraction Workforce Occupation Skill Level Commensurate with



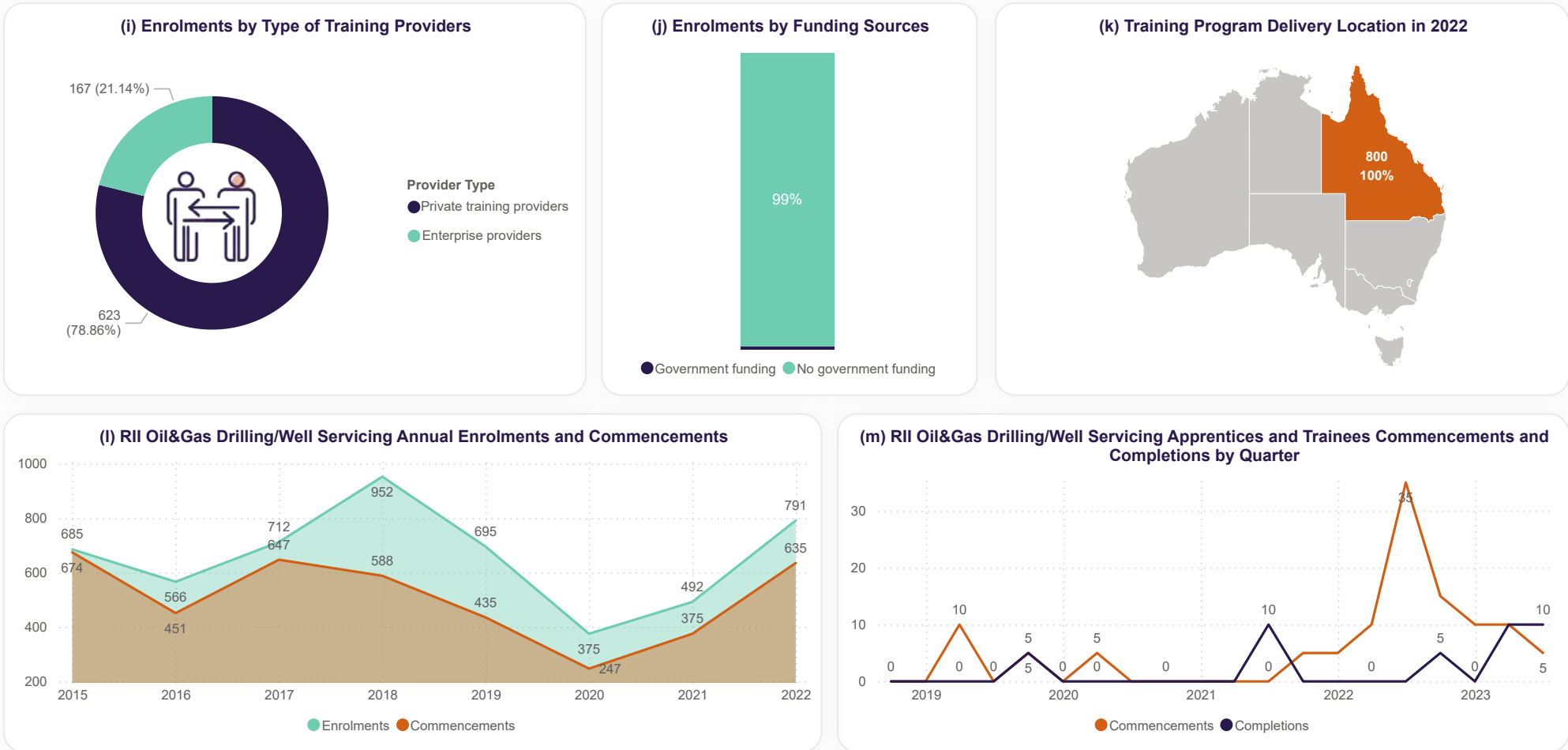
(h) Employment Projections of Oil and Gas Extraction



Sources: (e) ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL(ANZSCO 2013) (f) Employment Projections produced by VU for JSA (May 2023 to May 2033) (g) ABS Table Builder 2021 Census - employment, income and education (OCSKP Occupation Skill Level by INDP Industry of Employment) (h) Employment Projections produced by VU for JSA (May 2023 to May 2033)

# Oil and gas extraction training package insights

Figure 33: Oil and gas extraction training package insights



Sources: (i) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (j) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (k) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (l) NCVER. 2023. TVA program enrolments 2015-2022 (VOCSTATS). Adelaide, December (m) NCVER. 2023. Apprentices and trainees, Sep 2018 - Jun 2023 (VOCSTATS). Adelaide

## Oil and Gas Extraction Workforce Demographics

The oil and gas extraction workforce has declined over the past five years from 29,300 in 2018 (four-quarter average, February 2018 to November 2018) to 19,900 in 2023-2024 (four-quarter average, May 2023 to February 2024)<sup>163</sup>. However, projections from the JSA employment projections suggest that the workforce will rebound to 29,700 by 2033.<sup>164</sup>

This rebound in workforce size will be challenging based on the fact that 6 out of the sub-industry's top 10 occupations are experiencing skills shortages as reported by the 2023 Skills Priority List.<sup>165</sup> Tellingly, with the exception of the industry-specific ANZSCO occupations of Chemical, Gas, Petroleum and Power Plant Operators (most common) and Petroleum Engineers (second most common), the sub-industry requires similar skilled occupations as other sectors within the mining industry. This includes roles such as Driller, Miners and Shotfirers (third most common), Metal Fitters and Machinists and Electricians.

The geographical distribution of the workforce mimics the locations that foster the greatest commercial activity in oil and gas extraction, with Western Australia accounting for 44% of the workforce, Queensland for 31%, Victoria 13% and the remainder distributed across the remaining states and territories.

Western Australia's and Victoria's workforce operates in significantly different fashion to that in Queensland and New South Wales, with the majority of work occurring offshore on remote oil and gas platforms.<sup>166</sup> With Queensland and New South Wales activity being centred around onshore unconventional gas extraction, their workforce is more likely to be located close to communities and townships. The remote operations of Western Australia and Victoria have strong similarities, and the ensuing challenges, of the mining industry's FIFO operations.

Not unlike other parts of the mining industry, the oil and gas extraction sector has a relatively low percentage of females in its workforce (18%).

A unique aspect of the oil and gas extraction industry workforce is its age profile. Whilst many other sectors actively try to attract younger workers, the oil and gas extraction industry's workforce is centred around middle-aged workers. The industry has a median age of 42, with only 5% of workers below the age of 26 and only 6% aged 60+. This may be a reflection on the highly specialized skills needed by the sector and, at least insofar as offshore operations, the remote and harsh working conditions.

47% of the industry's workforce is classified as Skill Level 1, requiring at least a Bachelor degree or above. This is followed by Skill Level 3 roles, which typically reflect experienced tradespeople. Only 3% of roles are classified as suitable for unskilled workers.

The RII training package focuses on well servicing training, with the take-up of this training being focused on the land-based operations in Queensland.

<sup>163</sup> Australian Bureau of Statistics. *February 2024 - Labour Force, Australia*, Detailed - 'Table EQ06'.

<sup>164</sup> Jobs and Skills Australia. *Employment Projections*, 2023

<sup>165</sup> Jobs and Skills Australia. *Skills Priority List*, 2023

<sup>166</sup> Geoscience Australia. *Oil*, 2021.

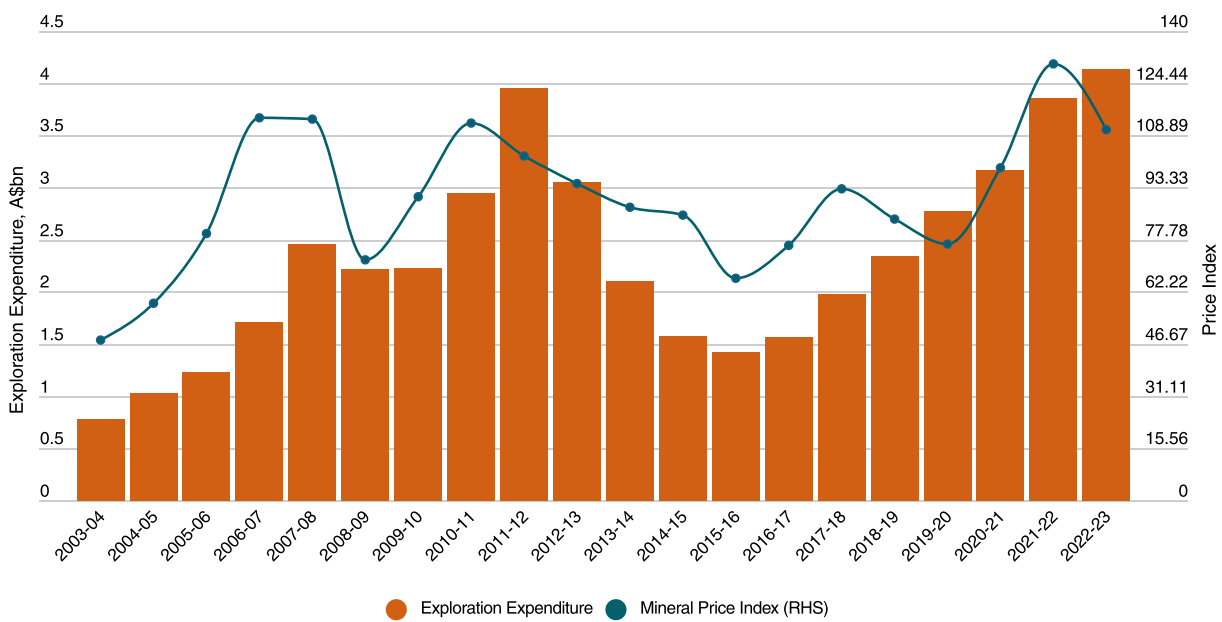


# Exploration and other mining support services overview

Exploration, including petroleum exploration, is the foundation of the mining, oil, and gas industry and the economic benefits it delivers to the nation. It isn't geology that creates Australia's competitive advantage in mining, oil, and gas; it is the geoscientists and other exploration professionals who discover and unlock our mineral and petroleum wealth. Ensuring a strong supply of highly skilled geoscientists and exploration professionals is vital to the long-term success of Australia's mining, oil, and gas industry and its economy.

Both mineral exploration activities are highly correlated with commodity prices [Figure 34](#), and while petroleum exploration followed a similar pattern until 2016, recent global events, such as COVID, and the war in Ukraine, have disrupted the relationship [Figure 35](#). Over time, commodity price cycles have repeatedly shown that exploration budgets are among the first items a mining company cuts to manage its costs. This creates an ongoing boom-bust cycle for exploration activity and geoscience employment that often cuses highly skilled professionals to leave the industry for alternative employment.

**Figure 34: Australia's exploration expenditure and commodity price cycles**



Sources: Australian Bureau of Statistics, *Mineral and Petroleum Exploration, Australia*, released 4 December 2023; World Bank, Commodity Markets website.

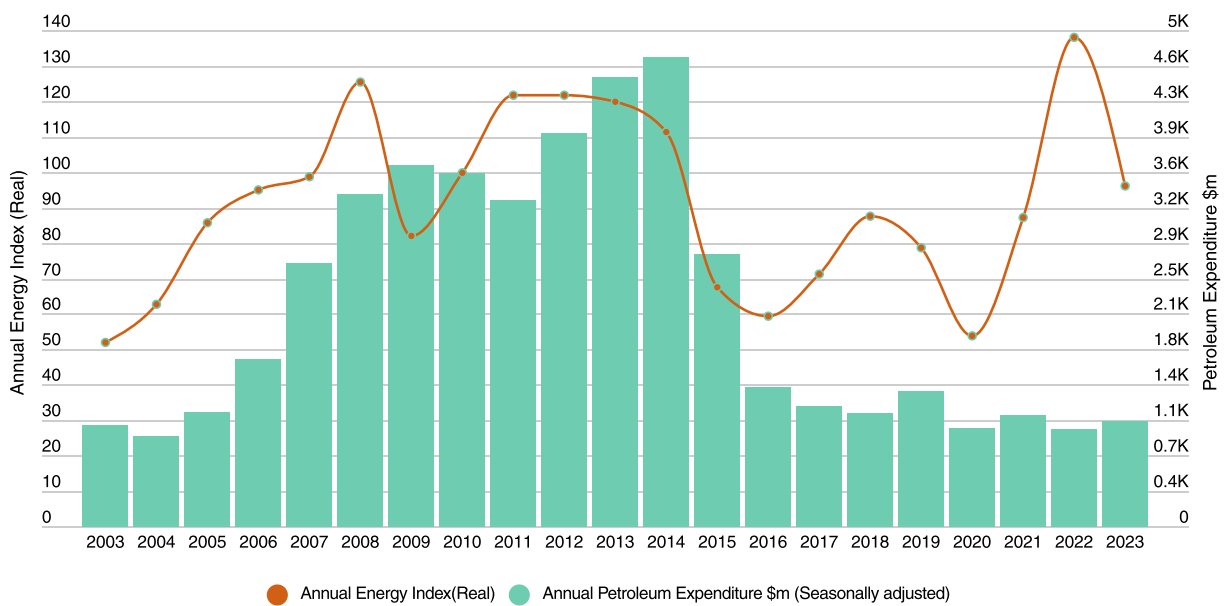
Present industry conditions and commodity prices are supporting high levels of mineral exploration activity. Exploration expenditure in 2022-23 was at an all-time high with companies investing \$4.1 billion on exploration programs at mineral deposits across Australia, 7% higher than the previous record set the year before, [Figure 35](#).<sup>167</sup> New records were set for exploration expenditures for copper, nickel, and other commodities (including lithium and rare earth elements), while gold exploration remained at high levels and still accounted for around one-third of exploration expenditures.<sup>168</sup>

<sup>167</sup> Australian Bureau of Statistics, *Mineral and Petroleum Exploration, Australia*, released 4 December 2023.

<sup>168</sup> Australian Bureau of Statistics, *Mineral and Petroleum Exploration, Australia*, released 4 December 2023.



**Figure 35: Petroleum Exploration Expenditure and Energy Index**



Sources: ABS, Mineral and Petroleum Exploration, Australia, TABLE 6a(Reference Period: March 2024), Expenditure by onshore and offshore | World Bank Commodity Price Data (The Pink Sheet)

Australia’s petroleum exploration expenditure in 2023 was \$1.06 billion, slightly up from the \$0.97 billion in 2022 but still below the highs of 2010-2020. The increase was driven by an increase in onshore exploration, which rose from \$591 million in 2022 to \$664 million in 2023. Offshore exploration has remained largely steady.<sup>169</sup> In addition to global oil prices, petroleum exploration is at least in part influenced by the Australian government’s release of offshore acreage in Commonwealth waters for petroleum exploration activities. The Government hasn’t released acreage since 2022.

While the record mineral exploration expenditure can be seen as a positive for the sector, it should be viewed in the context of the business cost pressures that have affected most parts of the Australian economy. Exploration activity has been no different from other sectors in experiencing rising fuel, labour, and supply chain costs. Although expenditure increased by 7%, the number of metres drilled decreased by 9.9% in the same period, albeit remaining at still very high levels.

Analysis of drilling activity over the long term confirms not only the cyclical nature of mineral exploration but also that, despite the mining boom and significant increase in the size of the mining industry, there has been no long-term increase in drilling activity in Australia. The number of metres drilled during the latest commodity price cycle is broadly consistent with the level of activity in the 1990s and post-GFC commodity price spike.<sup>170</sup>

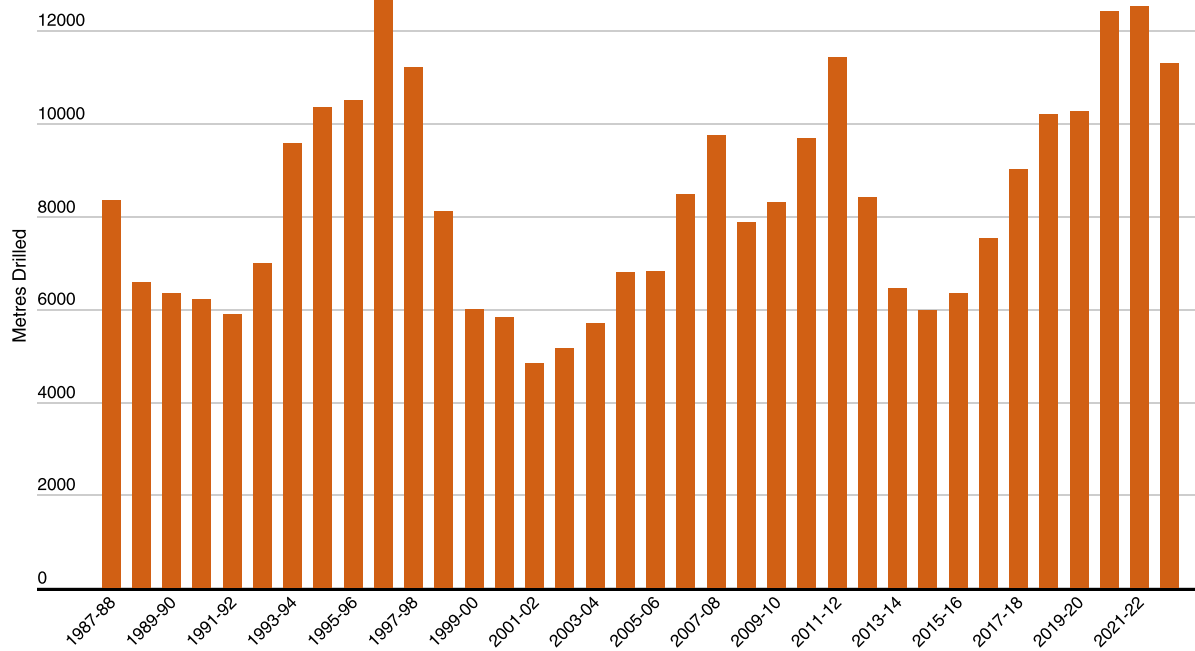
The increased role of geophysics, geochemistry, and data analysis in exploration programs is one explanation for the absence of activity growth in drilling. Exploration programs are increasingly using innovative approaches to better target ore bodies and design drilling programs. Nevertheless, drilling is

169 Australian Bureau of Statistics, *Mineral and Petroleum Exploration, Australia*, released 4 December 2023

170 Australian Bureau of Statistics, *Mineral and Petroleum Exploration, Australia*, released 4 December 2023.

still required in accordance with the standards set by the Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves (the JORC Code<sup>171</sup>) to measure a mineral resource or reserve. As such, the relatively low level of drilling activity in the last 10 years is reflected in the low growth in the Economically Demonstrated Resources of many commodities within Australia in the same period.<sup>172</sup>

**Figure 36: Mineral exploration metres drilled in Australia**



Sources: Australian Bureau of Statistics, Mineral and Petroleum Exploration, Australia, released 4 December 2023.

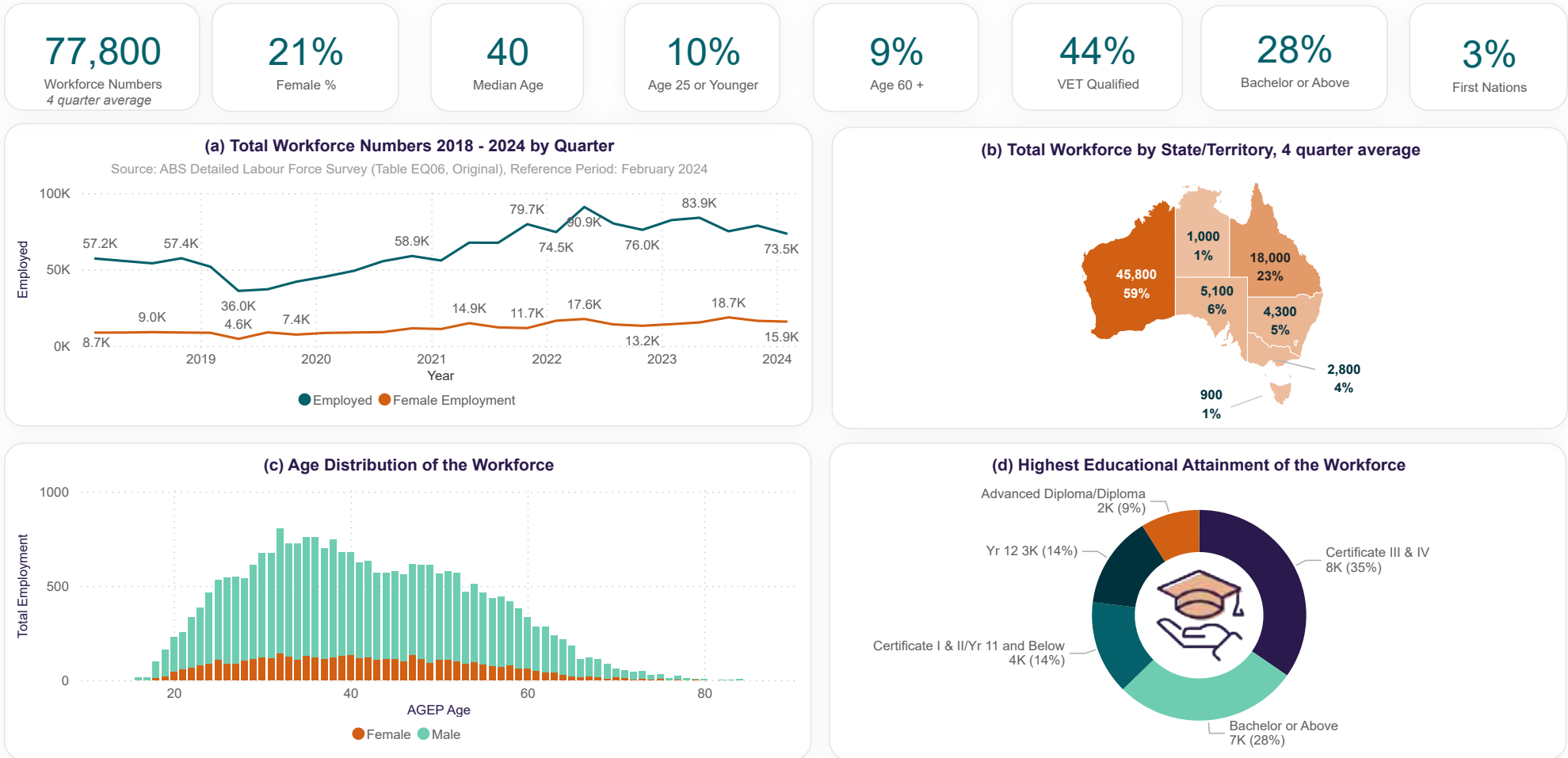
171 Australasian Joint Ore Reserves Committee (JORC), *What is the JORC Code?*

172 Geoscience Australia, *Australia's Identified Mineral Resources 2023*, released 18 March 2024.



# Exploration and other mining support services workforce demographic insights

Figure 37: Exploration and other mining support services workforce demographic insights

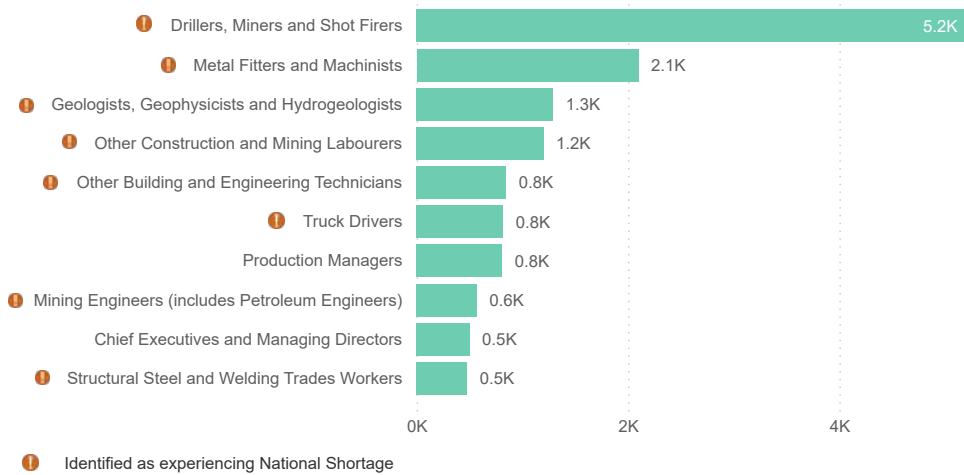


Sources: **(top row)** Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, Four-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 2-digit level INDP Industry of Employment **(a)** ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 **(b)** ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 **(c)** Census of Population and Housing (AGEP Age and SEXP Sex), 2021, TableBuilder **(d)** Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder **Notes:** Workforce Numbers are rounded to the nearest 100.

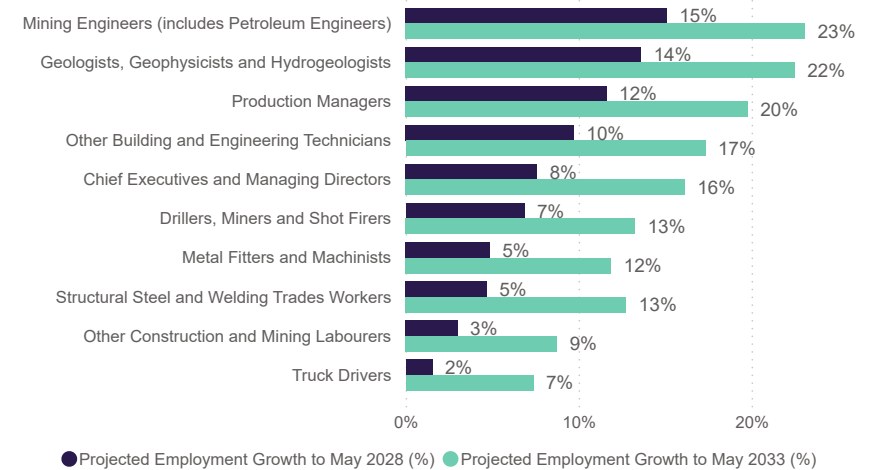
# Exploration and other mining support services workforce occupation insights

Figure 38: Exploration and other mining support services workforce occupation insights

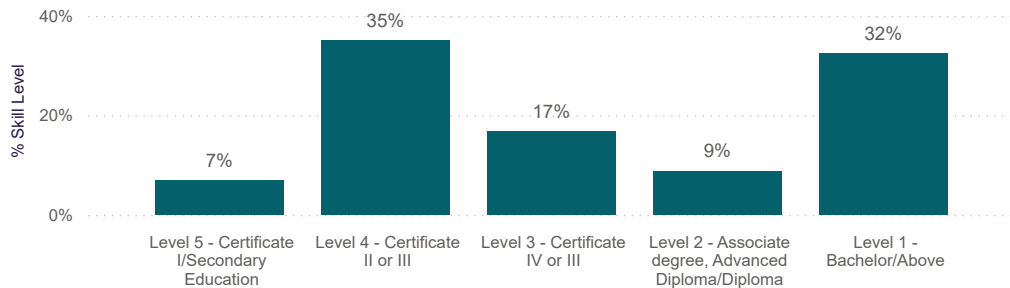
(e) Top 10 ANZSCO Occupations by Workforce Numbers



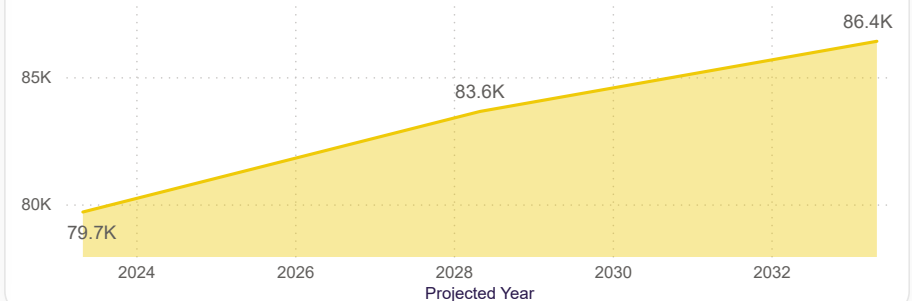
(f) Employment Projections by ANZSCO Occupations



(g) Exploration and Other Mining Support Services Workforce Occupation Skill Level Commensurate with



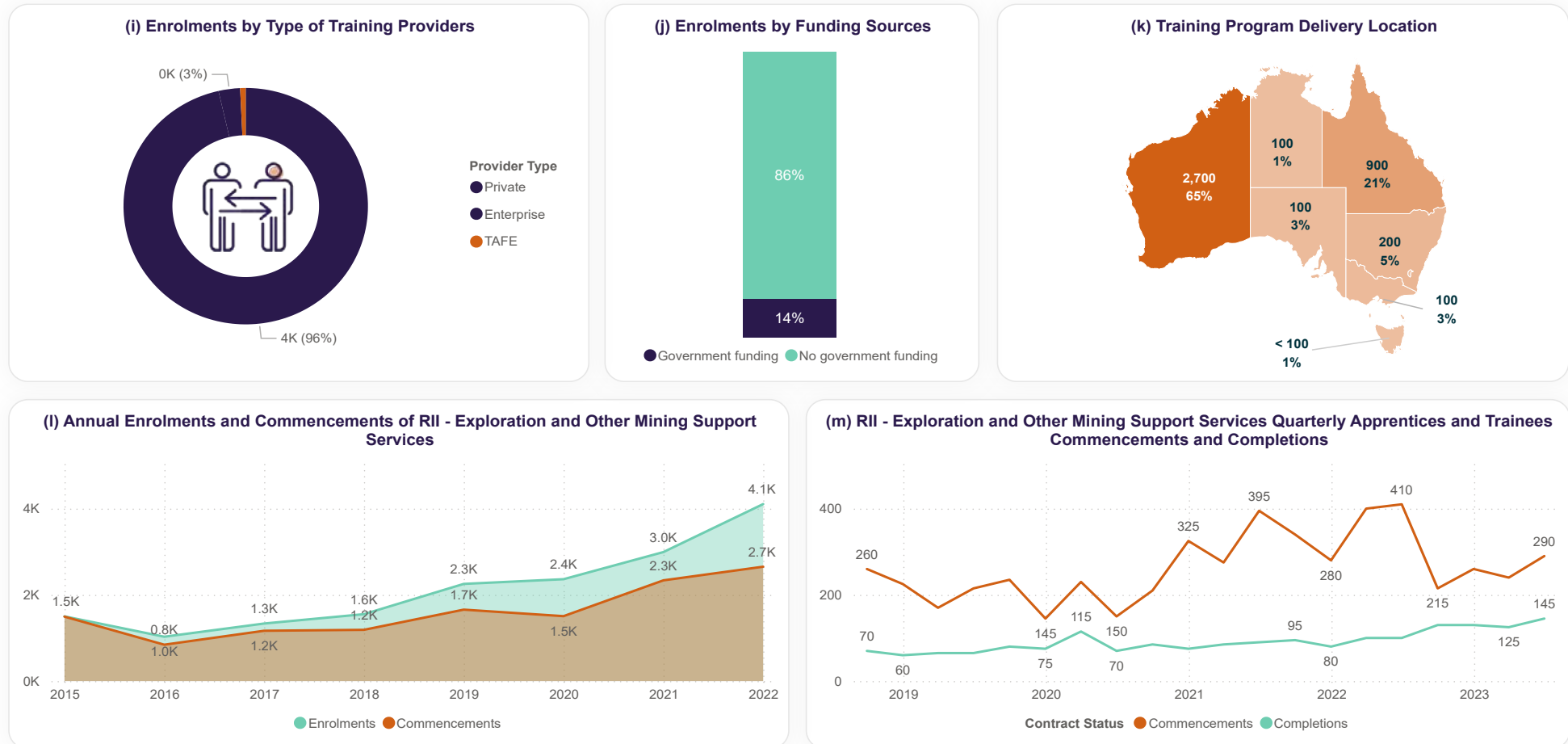
(h) Employment Projections of Exploration and Other Mining Support Services



Sources: (e) ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL(ANZSCO 2013) (f) Employment Projections produced by VU for JSA (May 2023 to May 2033) (g) ABS Table Builder 2021 Census - employment, income and education (OCSKP Occupation Skill Level by INDP Industry of Employment) (h) Employment Projections produced by VU for JSA (May 2023 to May 2033)

# RII exploration and other mining support services training package insights

Figure 39: RII exploration and other mining support services training package insights



Sources: (i) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (j) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (k) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (l) NCVER. 2023. TVA program enrolments 2015-2022 (VOCSTATS). Adelaide, December (m) NCVER. 2023. Apprentices and trainees, Sep 2018 - Jun 2023 (VOCSTATS). Adelaide **Note:** Figure (m) Apprentices and Trainees commencements and completions are rounded to nearest 5. 2. Figure (k) The enrolments are rounded to nearest 100.

## Exploration and other mining support services workforce demographics

With an overall workforce of just under 78,000, the exploration and other mining support services sector has been steadily expanding from 41,800 workers in 2019 (four-quarter average, February 2019 to November 2019)<sup>173</sup>. JSA's Employment Projections anticipate a further 8% growth through 2033, which would see the workforce consist of 86,400 workers.

A challenge for the sector in continuing its workforce expansion is the fact that 8 out of the sector's top 10 occupations number of workers are identified by the 2023 Skills Priority List as experiencing a shortage, [Figure 38 \(e\)](#). Tellingly, all top 6 occupations are experiencing a skills shortage, including the highly specialised roles of geologists, geophysicists, and hydrogeologists.<sup>174</sup>

Geologists, geophysicists, and hydrogeologists roles in the exploration sector, which are also identified as critical clean energy occupations, are forecast to grow by 22.5% over the coming years, [Figure 38 \(f\)](#). Coupled with persistently high vacancies in the market this occupation is one of the sector's key pain points.<sup>175 176</sup>

*Geologists, geophysicists, and hydrogeologists roles in the exploration sector, which are also identified as critical clean energy occupations, are forecast to grow by 22.5% over the coming years*

Equally important are drillers and driller's offsiders, who are qualified through the VET system. These workers are also in shortage and are expected to grow by over 13% in the coming nine years, [Figure 38 \(f\)](#).

Not unlike metal ore mining, much of the exploration and other mining support services workforce is in Western Australia (59%), followed by Queensland (23%) and South Australia (6%), [Figure 37 \(b\)](#).

The sector has a female workforce representation of 21%, with younger workers (10% < 25) just staying ahead of those who are nearing retirement (9% 60+). With a greater reliance on specialised occupations – such as geologists, metallurgists, and mining engineers – it is not surprising that this sector has the highest proportion of its workforce with the highest qualification coming from higher education (28%), [Figure 37\(d\)](#). VET still plays an important part, especially for drillers and driller's offsiders, with 44% of the workforce having a VET qualification as their highest qualification attained, [Figure 37\(d\)](#).

Enrolments within relevant RII qualifications for this sector broadly follow the workforce's geographic distribution around Australia, with overall enrolments growing in line with the industry's workforce. By the end of 2022, 4,100 students were enrolled in relevant RII qualifications for this sector, [Figure 38 \(i\)](#). Noting that enrolments are related to commencements, the trend of increasing commencements and enrolments is expected. The growing gap could reflect several factors that would need further investigation; these include students opting for longer courses, deferring their studies, or shifting to part-time study. Each of these choices delays their completion, increasing the discrepancy between commencements and enrolments.

<sup>173</sup> Australian Bureau of Statistics. *February 2024 - Labour Force, Australia*, Detailed - 'Table EQ06'.

<sup>174</sup> Jobs and Skills Australia. *'Skills Priority List'*. 2023

<sup>175</sup> Jobs and Skills Australia. *'Employment Projections'*. 2023

<sup>176</sup> Jobs and Skills Australia. *Internet Vacancy Index*, ANZSCO4 Occupations, States and Territories – Feb 2024 (4-quarter average). 2024

## Exploration and other mining support services key workforce drivers

Exploration drilling can be a physically demanding, albeit well-paid, occupation that requires working in some of Australia's most remote regions.<sup>177</sup> Occupations within the exploration drilling sector offer a unique opportunity for workers seeking variety, high pay, and manual labour. Variety comes in the form of a very project-based work environment, especially for those who work for drilling and exploration contractors, creating a higher level of transiency for the sector.

As highlighted in this sector's [overview](#), exploration and drilling expenditure follows the cyclical nature of commodity pricing, creating a greater level of flux in the workforce. It is not surprising that the combination of harsh working conditions, transiency and work flux has been shown to bring about staff turnover rates 2 to 3 times higher than other mining sectors.<sup>178</sup> This will continue to create significant workforce planning challenges to the sector, though technological advancements may assist.

*drones, more advanced unmanned aerial vehicles, automatic spectroscopic scanning of drill cores and automatic data processing are examples of technologies that are emerging in the exploration sector*

Much like other sectors within the mining industry, technological innovations are rapidly changing the way some tasks are performed. The use of drones, more advanced unmanned aerial vehicles, automatic spectroscopic scanning of drill cores and automatic data processing are examples of technologies that are emerging in the exploration sector.<sup>179</sup>

Other locally led innovations in the drilling and exploration space include the introduction of Hyperspectral logging technologies (HyLogging), which greatly improves the accuracy and efficiency of mineral sample characterisations.<sup>180</sup>

While such innovations are designed to achieve more with the existing workforce, they could also help attract new entrants to the industry. Equally, advanced technologies in this sector could also create the challenge of having to upskill the existing workforce with higher digital skills.

177 Australian Drilling Industry Association. *Looking for a Career in Drilling?* 2024.

178 D. S. Houghton. *Long-distance Commuting: a new Approach to Mining in Australia*. The Geographical Journal. 1993

179 Kazuya Okada. Breakthrough Technologies for Mineral Exploration. *Mineral Economics* 35. 2022.

180 CSIRO. *HyLogging: saving millions through automated drill core logging*. 2019.





**Mining and  
Automotive**  
Skills Alliance

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Australian Government Department of Employment and Workplace Relations.

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# Automotive Industry

## Workforce Plan 2024



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## Acknowledgement of Country

In delivering our 2024 Workforce Plan we acknowledge the Traditional Custodians of the lands on which we live and work.

We acknowledge Traditional Custodians of Country throughout Australia and their connections to land, sea and community.

Thank you to MTA NSW for allowing the use of their images in the Workforce Plan 2024 Automotive section.

## Automotive industry overview

Employing over 320,000 workers, Australia's automotive industry has continued to change and adapt to an ever-evolving operating landscape. As large-scale automotive manufacturing declined, the focus shifted to specialised manufacturing, high-tech engineering, design, and components, keeping Australia on the automotive map. The industry is now adapting to a new wave of technologies, from EVs to autonomous driving systems, reflecting the industry's ability, and need, to adapt and innovate.

Australia's automotive industry encapsulates the sale, service, and repair of vehicles, including motorbikes, bicycles, and all-terrain vehicles, specialised heavy vehicle and bus manufacturing, customised body and trailer manufacturing, marine mechanical services, and the manufacture and sale of parts and accessories.

January 2023, Australia had 21,168,462 registered vehicles on the road, a number that has been growing by approximately 400,000 vehicles per year

Australia has had an enduring love affair with the automobile, with new car sales consistently beating previous records. By current trends, Australians are purchasing over a million new vehicles a year in one of the most competitive markets in the world.<sup>181</sup> As of January 2023, Australia had 21,168,462 registered vehicles on the road, a number that has been growing by approximately 400,000 vehicles per year.<sup>182</sup>

According to the Federal Chamber of Automotive Industries (FCAI), there are 60 brands of motor vehicles in Australia (including both light and heavy vehicles) with 380 different models that are sold by over 3,500 dealers.<sup>183</sup> Population growth, the volume of vehicles in circulation and the variety of models enjoyed by Australians are key demand drivers for automotive industry employment.

181 Federal Chamber of Automotive Industries. *Australia breaks all-time new vehicle sales in 2023*. 2024.

182 Bureau of Infrastructure and Transport Research Economics. *Road Vehicles, Australia January 2023*. 2023

183 Federal Chamber of Automotive Industries. *The Australian New Vehicle Industry*. 2024



The easing of global supply shortages has helped the industry in Australia to generate nearly \$174 billion in revenue in 2022–23, with predictions that the industry will grow in the next 5 years to yield over \$185 billion annually.<sup>184</sup> The sale of imported motor vehicles is expected to account for over 66% of revenue (\$115.7 billion), followed by the sale of parts and accessories (13%, \$22.6 billion), the provision of repair and maintenance services (13%, \$22.6 billion) and the local manufacture of automotive products (7.3%, \$12.7 billion).<sup>185</sup>

2023 saw new vehicle sales achieve the highest result on record, as Australian customers took delivery of 1,216,780 new vehicles.<sup>186</sup> 2023's sales data also highlighted that consumers were continuing to embrace low emissions technologies, with EVs accounting for 7.2% of sales and hybrid vehicles accounting for 8.1% of sales.<sup>187</sup>

Although the onshore manufacturing of cars concluded in 2017, there is still a healthy market in the manufacture of heavy vehicles, particularly trucks and buses. IBISWorld states that the automotive manufacturing industry generated \$4.2 billion in revenue throughout 2023, from 338 businesses.<sup>188</sup>

Australian-manufactured trucks contain highly sought-after value-added features that are made specifically for the Australian environment, with the 2 major players being Volvo and PACCAR (Kenworth and DAF trucks), which are expected to continue their industry domination.<sup>189</sup>

The Bus Industry Confederation (BIC) lists 18 Australian manufacturers in its report *Moving People* published in 2020, estimating that "in the manufacturing of the completed bus, \$5 billion is contributed to the Australian economy each year and close to \$1.5 billion in supplies and services to keep the bus operational and delivering services".<sup>190</sup>

The Australian public's love of the great outdoors has driven a booming demand for new caravans in Australia and has boosted the productive output of recreational vehicle (RV) manufacturing. The caravans and camper trailer markets combined are worth \$3 billion annually, with campervans and motorhomes netting a further \$504.4 million in a very diverse industry that sees the market leader, Jayco, securing 11.4% of the market.<sup>191</sup>

184 IBISWorld. *Automotive Industry in Australia. 2023*

185 IBISWorld. *Automotive Industry in Australia. 2023*

186 Federal Chamber of Automotive Industries. *Australia breaks all-time new vehicle sales in 2023. 2024.*

187 Federal Chamber of Automotive Industries. *Australia breaks all-time new vehicle sales in 2023. 2024.*

188 L. Duane-Davis. *Motor Vehicle Manufacturing in Australia. 2023.* IBISWorld.

189 L. Duane-Davis. *Motor Vehicle Manufacturing in Australia. 2023.* IBISWorld.

190 Bus Industry Confederation. *Moving People: Australian Bus and Coach Industry: A Snapshot. 2020*

191 J. Fahey. *Motor Vehicle Body and Trailer Manufacturing in Australia. 2023.* IBISWorld.



IBISWorld values the manufacturing of motor vehicle parts and accessories in Australia at \$4.1 billion annually, with powertrain and chassis parts making up over 65% of that with a contribution of \$2.7 billion in 2022-23.<sup>192</sup>

The automotive industry is heavily reliant on qualified tradespeople and, consequently, on the VET system, which is reflected in the significant enrolment statistics for the AUR training package. As the various data insights for the industry and its sectors show, many of the key occupations required by the industry are hampered by skills shortages.



Industry adapting to a new wave of technologies from EVs to autonomous driving systems



Australians are purchasing over a million new vehicles a year



60 brands of motor vehicles in Australia



Generating nearly \$174 billion in revenue in 2022-23



Consumers embracing low emissions technologies with EVs at 7.2% of sales and hybrid at 8.1%



Heavy vehicle manufacturing is a healthy market in Australia



\$5 billion contributes to the Australian economy in bus supplies and services

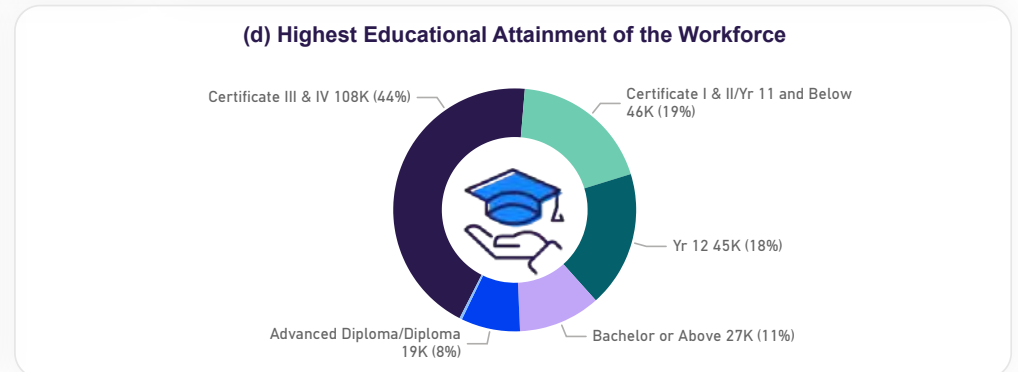
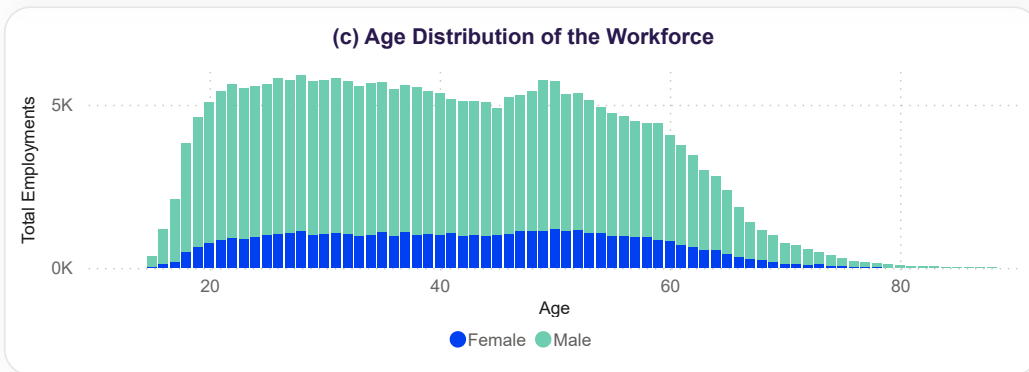
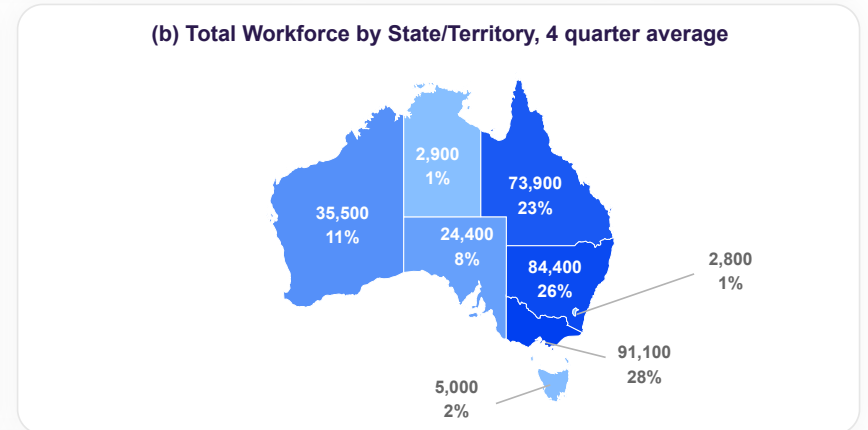
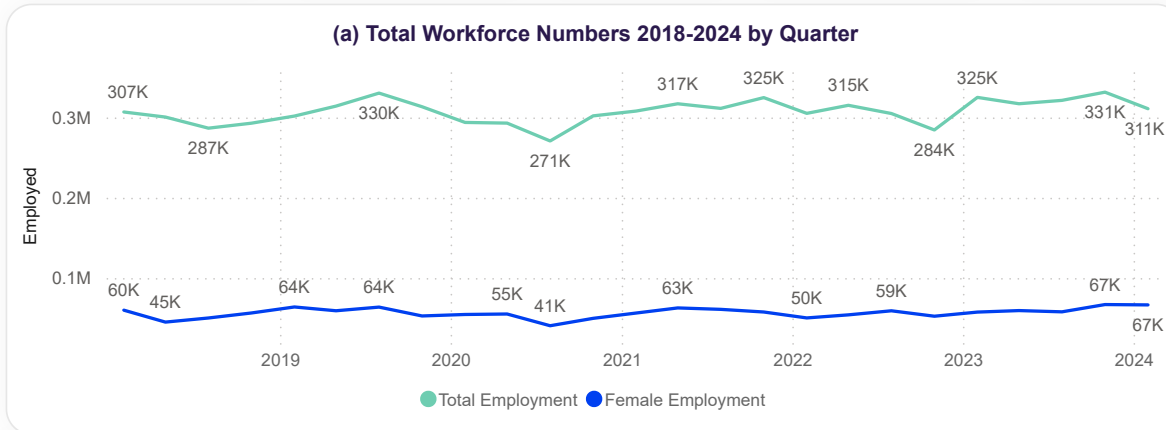
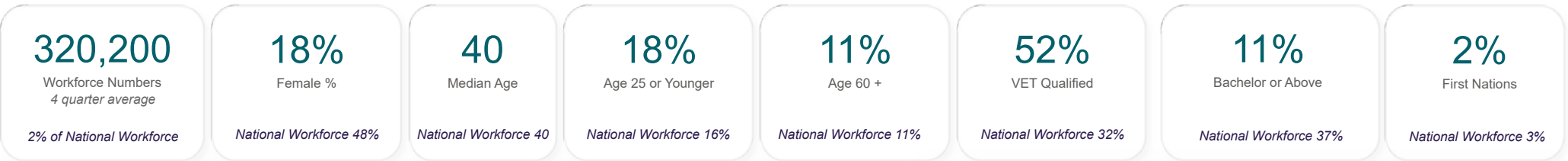


Manufacture of motor vehicle parts in Australia at \$4.1 billion annually

<sup>192</sup> DK Jeswanth. *Motor Vehicle Parts and Accessories Manufacturing in Australia, 2023*. IBISWorld.

# Workforce insights

Figure 40: Automotive insights dashboard 1

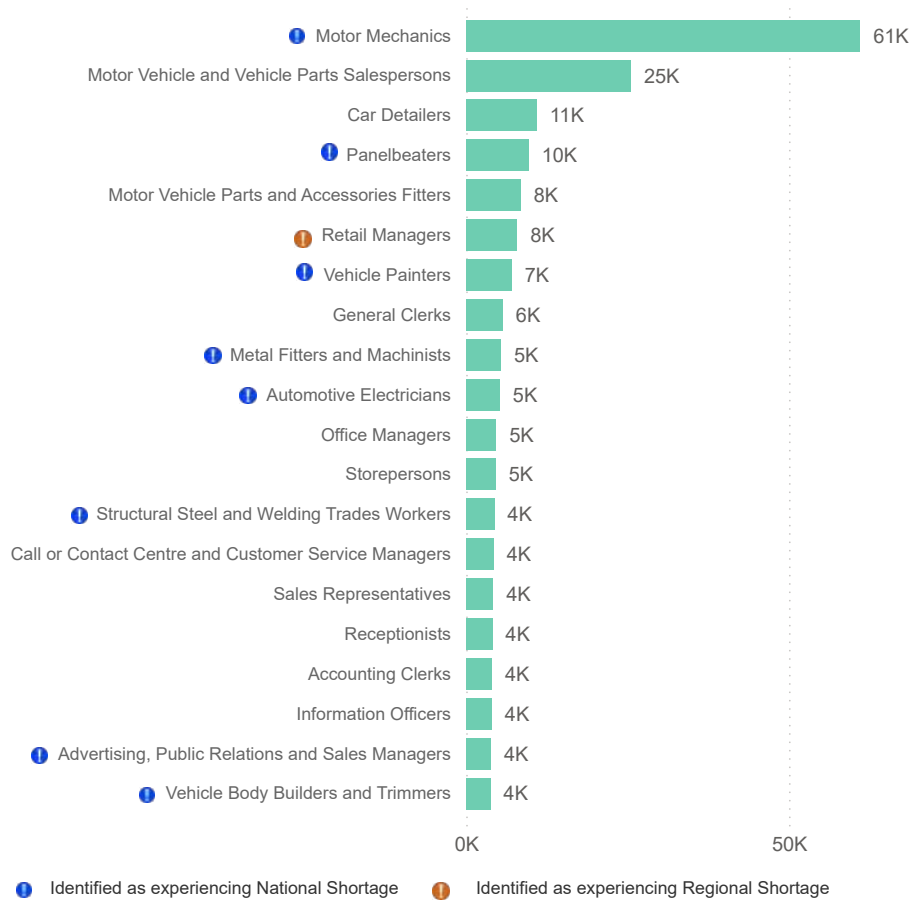


**Sources:** (top row) Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, Four-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 3-digit level INDP Industry of Employment (a) ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 (b) ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 (c) Census of Population and Housing (AGEP Age and SEXP Sex), 2021, TableBuilder (d) Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder **Notes:** Workforce Numbers are rounded to the nearest 100.

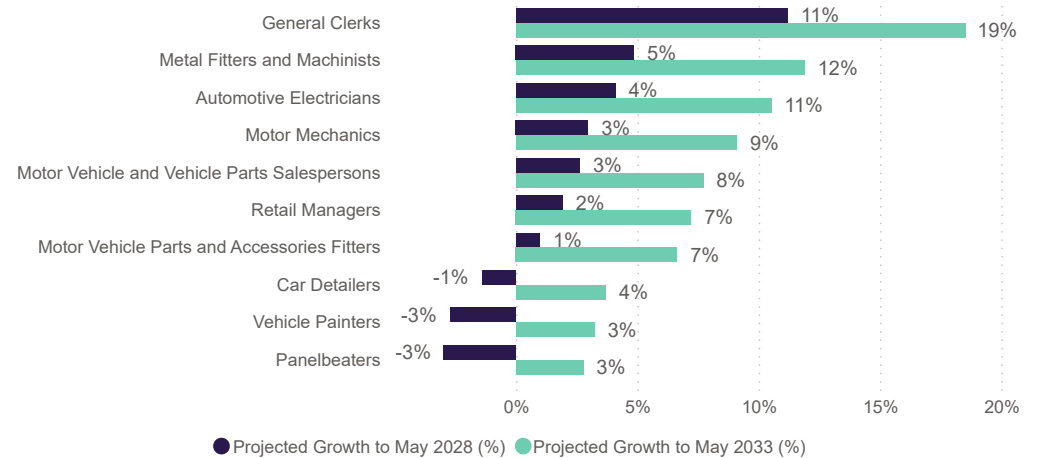
# Workforce insights

Figure 41: Automotive insights dashboard 2

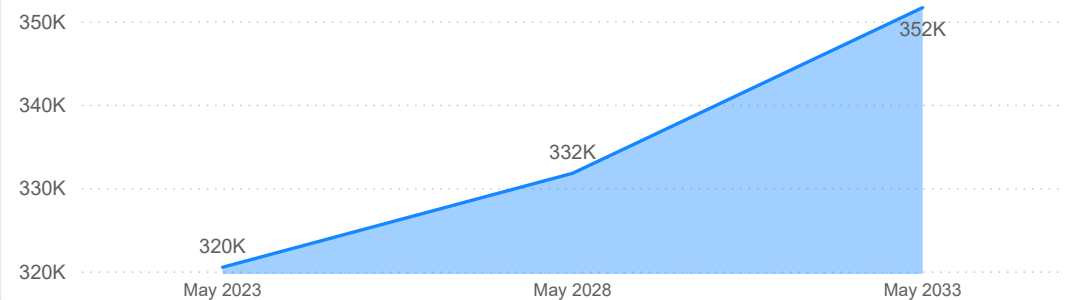
(e) Top 20 ANZSCO Occupations by Workforce Numbers



(f) Employment Projections by ANZSCO Occupations



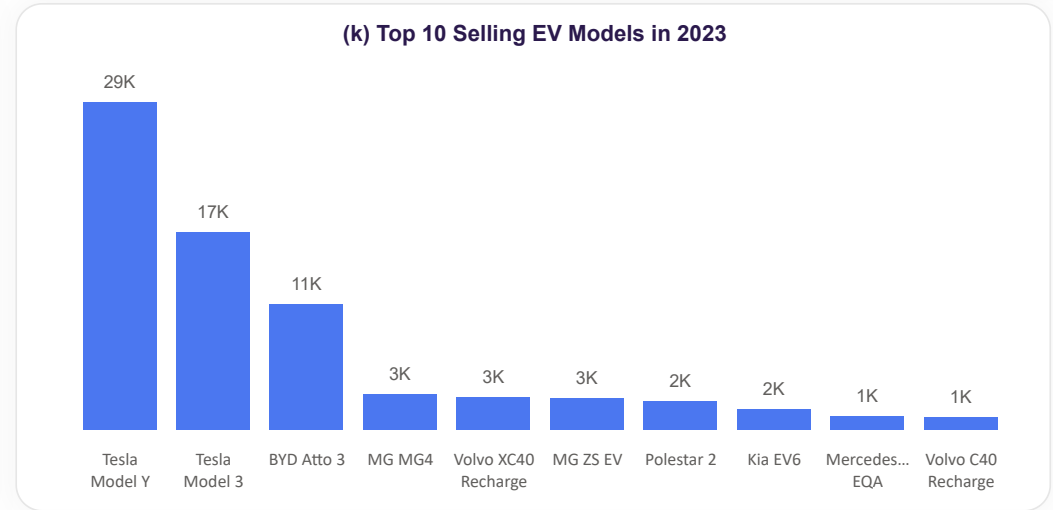
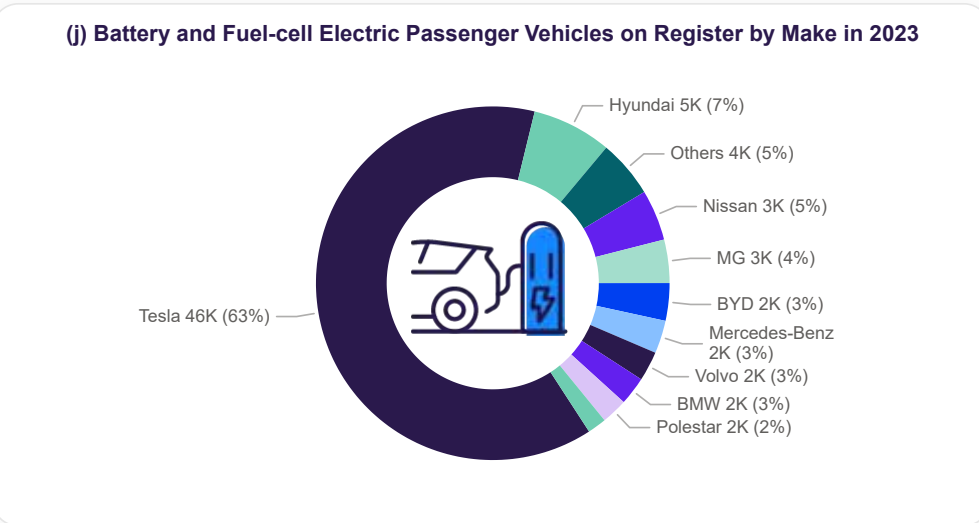
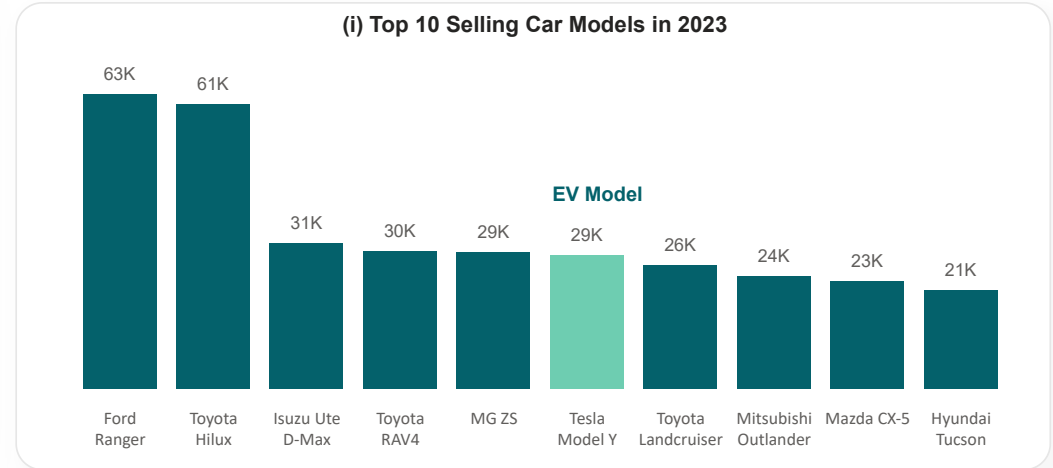
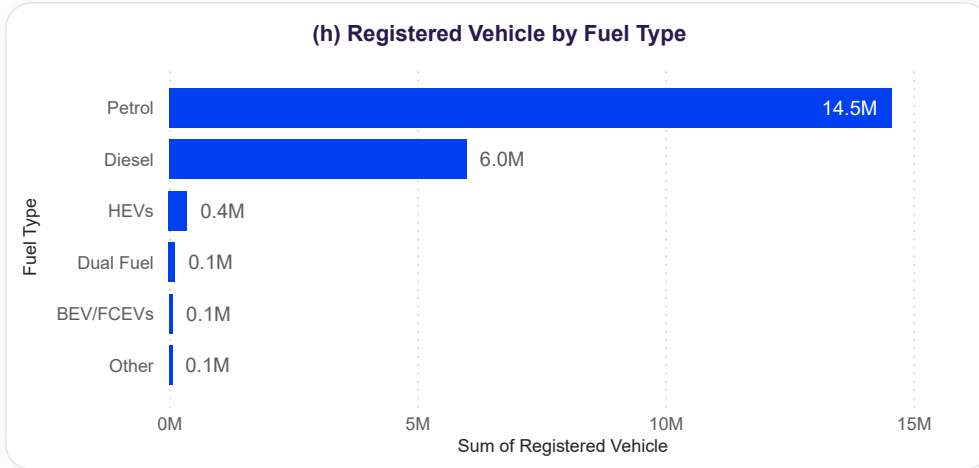
(g) Employment Projections of Automotive Industry



Sources: (e) ABS Table Builder 2021 Census - employment, income and education | JSA Skills Priority List 2023. 4-dig SPL (ANZSCO 2013) (f) Employment Projections produced by VU for JSA (May 2023 to May 2033) (g) Employment Projections produced by VU for JSA (May 2023 to May 2033)

# Workforce Insights

Figure 42: Automotive insights dashboard 3



Sources: (h) BITRE Road Vehicles, Australia, January 2023 (Table 4) (i) Federal Chamber of Automotive Industries VFACTS report, December 2023 (j) BITRE Road Vehicles, Australia, January 2023 (Table 8) (k) Fleet EV News. Industry Statistics, Top 10 EVs in 2023



# Industry-wide trends and priorities

## Community perceptions of the automotive industry

When AUSMASA questioned how the industry is likely to be perceived by younger generations, many industry stakeholders feared that the perception was that working in automotive would be dirty, oily, and unsophisticated. The industry believes this perception is outdated, given the advances in technology and the industry more broadly. Paradoxically the industry's own perception of itself could be a factor in this. The Capricorn Society State of the Nation report highlighted that only 57% of the Capricorn Society's members would recommend a career in the automotive industry to a young person.<sup>193</sup>

*many industry stakeholders feared that the perception was that working in automotive would be dirty, oily, and unsophisticated*

Unlike the Generation Z perceptions data available for the mining industry, no substantial research has been identified that explores the attitudes towards automotive careers prior to that choice being made. Understanding the views, concerns and potential misconceptions about the automotive industry would be highly beneficial in developing specific strategies for attracting new entrants.

The Australian Automotive Aftermarket Association (AAAA) has undertaken a significant review of automotive apprentices to measure their satisfaction and challenges across a range of factors. This survey provides valuable insight into perceptions after the choice to enter the industry has been made.

*96% of first year apprentices were either satisfied or very satisfied with their experience, with 41% of apprentices noting their interest in working on advanced vehicle technologies*

Key aspects of AAAA's research show that 96% of first year apprentices were either satisfied or very satisfied with their experience, with 41% of apprentices noting their interest in working on advanced vehicle technologies such as electric and hybrid vehicles and advanced driver-assistance systems.<sup>194</sup>

Such findings are encouraging but require entrants to have made the choice to commence an apprenticeship within the automotive industry in the first place. The same survey showed that, particularly for female participants, receiving negative responses from family, friends, and peers in relation to choosing an automotive apprenticeship was a key challenge.<sup>195</sup>

If such an influence on potential entrants is based on outdated perceptions of the industry, it would support the views held by the industry of the need for greater career education.

One of AUSMASA's key current projects is the development of research insights into how Generation Z perceives the automotive industry. The insights gained from this project will allow AUSMASA to work

<sup>193</sup> Capricorn Society. *State of the Nation* - 2022.

<sup>194</sup> Australian Automotive Aftermarket Association. *Addressing Automotive Skills Shortages - Summary Report*. 2022.

<sup>195</sup> Australian Automotive Aftermarket Association. *Addressing Automotive Skills Shortages - Summary Report*. 2022.

with industry to explore strategies for better communicating the exciting career opportunities that are available in the automotive industry.

## Diversifying the workforce

The automotive industry has historically been strongly male-dominated, with female participation heavily skewed towards administration and sales-related roles.

Female participation in trades such as motor mechanics, auto electricians, panel beaters and spray painters remain extremely low, with ABS Labour Force figures for January 2024 showing only 900 (0.82%) of all motor mechanics in Australia (109,500) are female. Vehicle painters fare better at 1,800 (12%) women among a total of 15,000.<sup>196</sup>

The 2020 report '*Lifting the bonnet on the barriers to diversity & inclusion*' prepared by Tradeswomen Australia Foundation, identified that the automotive industry's engagement with diverse groups has been disproportionately lower than other industries over the last 20 years. It is important to understand that not all automotive workplaces are the same. Approaches to managing cultural reform, policies and practices that support diversity, equity and inclusion need to be flexible and tailored to meet the specific needs of the employees and the workplace.<sup>197</sup>

As within the mining sector, the automotive industry's gender dynamics and power imbalances can contribute to the prevalence of sexual harassment. Traditionally male-dominated, the industry often perpetuates a culture where men hold positions of authority, and women face marginalisation.<sup>198</sup>

Workplace Gender Equality Agency's  
**2022-23** Report shows an average  
total remuneration gender pay gap of  
**25.5%**.

According to the Workplace Gender Equality Agency's 2022-23 Report, the 21,603 employees from 19 reporting employers within the Repair and Maintenance subdivision had an average total remuneration gender pay gap of 25.5%. The gap is driven by the high percentage of men in the upper and upper middle pay quartiles – 92% and 88% respectively, while most women in the subdivision work in the lower middle and lower pay quartiles – 27% and 41%.

The average total remuneration for the upper quartile is \$194,000, while the lower quartile is \$67,000.<sup>199</sup>

NCVER enrolment statistics show that female employment in the industry may improve in the future, with approximately 4.5% female participation in the *AUR30620 Certificate III in Light Vehicle Mechanical Technology* and, perhaps more encouraging, 13.2% female participation in the *AUR20720 Certificate II in Automotive Vocational Preparation*, see [Appendix I](#).

*for female participants, receiving negative responses from family, friends, and peers in relation to choosing an automotive apprenticeship was a key challenge*

196 Australian Bureau of Statistics. *January 2024 - Labour Force, Australia, Detailed - Table EQ08*. 2024.

197 Tradeswomen Australia Foundation. *Lifting the bonnet on the barriers to diversity & inclusion*. 2020.

198 Wendy Tuohy. '*Get Caroline, she can MacGyver it!*: Women love the work in hyper-male industries, if not the harassment'. SMH.com.au. 2020.

199 Workplace Gender Equality Agency. *WGEA Data Explorer - Industry Results*. 2024.

The industry has recognised that improving female participation in the automotive industry is not only an important opportunity for addressing labour shortages but also an opportunity to create a more diverse and welcoming culture for all.<sup>200</sup>

Research by the University of Sydney showed that women were more likely to be given apprenticeship opportunities and succeed when commitment to gender diversity was taken seriously by leadership and support from women's trades networking groups was available.<sup>201</sup>

An example of an industry-led initiative to support women in the automotive trade by networking with them, mentoring them, and encouraging them to succeed is the 'Women in Automotive organisation launched by the Victorian Automotive Chamber of Commerce (VACC) in 1999. Similar initiatives in other states include 'Auto Women' in Queensland, which was established in 2022 by the Motor Trades Association of Queensland (MTAQ).

The automotive industry's proportion of First Nations employees is recorded at just 2%, which is below the national average of 2.63%. One example of an industry initiative aimed at increasing the amount of First Nations workers within the automotive industry is a program run by On Common Country called '*Customised First Nations Work Preparation Program for the Automotive Industry*'. The program, which is run out of Townsville has recently completed its second intake, with 9 of the 13 participants subsequently securing work within the local automotive industry.<sup>202</sup> Plans are underway to expand this program to other regional centres.

## AREA OF FOCUS

While the automotive industry has several programs designed to attract and support a more diverse workforce, it must continue to prioritise this and lead from the top down. A diversified workforce will help further improve the industry's perception and consequently attract new entrants into automotive careers.

## Skilled migration

Not unlike in the mining industry, automotive industry stakeholders have highlighted a range of barriers preventing the skilled migration system from having a bigger impact on addressing skills shortages than it currently is.

Despite qualified automotive technicians and related trades such as panel beaters, vehicle painters and automotive electricians from other countries generally working on, and thereby experienced in, the same models of vehicles that are on Australian roads, successfully supporting their migration to Australia is cumbersome and costly.

200 Capricorn Society. *State of the Nation - 2022*. 2022.

201 Sarah Oxenbridge, Rae Cooper, and Marian Baird. *One of the boys? - The Work and Career Experiences of Australian Women Working in Automotive Trades Occupations*. Sydney: University of Sydney. 2019.

202 Evan Morgan. *Plans in place to expand On Common Country after successful first run*. Townsville Bulletin. 2024.

Capricorn Society's 2023 State of the Nation survey highlighted several key barriers faced by industry when attempting to utilise skilled migration, including the complexity of the process (62% of respondents), cost (35%) and the lack of housing for skilled migrants (33%).<sup>203</sup>

A common frustration raised by the industry is the length of time and cost it takes Trades Recognition Australia (TRA) to complete skills assessments as the respective assessing authority. There have been calls to give industry peak bodies such as the MTAA, and state-based equivalents, the ability to undertake skills assessments, given a wide range of organisations including Engineers Australia already provide skills assessments.<sup>204</sup>

Despite these challenges, skilled migration plays an important role in being able to fill the many roles within the automotive industry affected by skills shortages. A survey by Deloitte of 519 Motor Trade Association of Australia (MTAA) members employing 8,400 people, or approximately 2.2% of industry (as defined by MTAA) employment, found that across the respondents', 29% of vacancies were eventually filled via visa sponsorship, rising to 41% for motor mechanics (general) and 93% for vehicle bodybuilders.<sup>205</sup> Industry insights such as these show how important an efficient and cost-effective skilled migration program is for meeting current and future skills shortages.

While skilled migration remains an issue for industry, the Government is seeking to improve the integrity, quality, and timeliness of skills assessments following its Migration Review in 2022. As part of this work and its new Migration Strategy, the assurance requirements for existing assessing authorities and new organisations applying to become assessing authorities are being reviewed to enhance assurance, continual improvement, and facilitate best practices.<sup>206</sup>

29% of vacancies were eventually filled via visa sponsorship, rising to 41% for motor mechanics (general) and 93% for vehicle bodybuilders

### AREA OF FOCUS

Industry feedback will be important in relation to the challenges faced in trying to fill vacancies and the importance that skilled migration plays in being able to meet skills demand.

### AREA OF FOCUS

More information is necessary to improve the skilled migration system's efficiency and responsiveness to the automotive industry skills shortages.

203 Capricorn Society. *State of the Nation – Skilled Migration*. 2023.

204 Insurance Council of Australia. 2024-25 Pre-Budget Submissions. 2024.

205 Deloitte Access Economics. *Skills shortages in the Australian automotive industry*. 2024.

206 Department of Employment and Workplace Relations. *Discussion Paper: Draft Best Practice Principles and Standards for Skilled Migration Assessing Authorities*. 2023.

## Automotive repair and maintenance overview

The automotive repair and maintenance sector keeps Australia's vehicles on the road. The sector employs over 158,000 people within the automotive industry and consists of 27,704 service and repair workshops, 13,907 automotive body, paint and interior repair workshops and 3,487 automotive electrical service and repair workshops across the country.<sup>207</sup>

Automotive service and repair workshops have increased in number by 11.5% since 2021.<sup>208</sup> While an element of increased workshop numbers would be expected to be tied to growth in overall vehicle numbers, additional research could assist in identifying other factors and trends, especially since the growth in workshops is increasing at double the rate of growth in overall vehicle numbers in Australia.

The total number of vehicles in the market and the number of workshops create a strong demand for qualified staff.

A survey of 1,900 of its 25,000 Australian and New Zealand members in the automotive industry in 2022 by Capricorn Society highlighted that most member workshops were independently operated, servicing on average 27.3 vehicles per week in workshops with an average of 2.9 hoists.<sup>209</sup> The survey also gave insights into workshop size, with 22% of respondents operating with just one team member, 54% with 2 to 5 team members, and 24% employing 6 or more.

<sup>207</sup> Australian Bureau of Statistics. *Counts of Australian Businesses, including Entries and Exits, 2023*

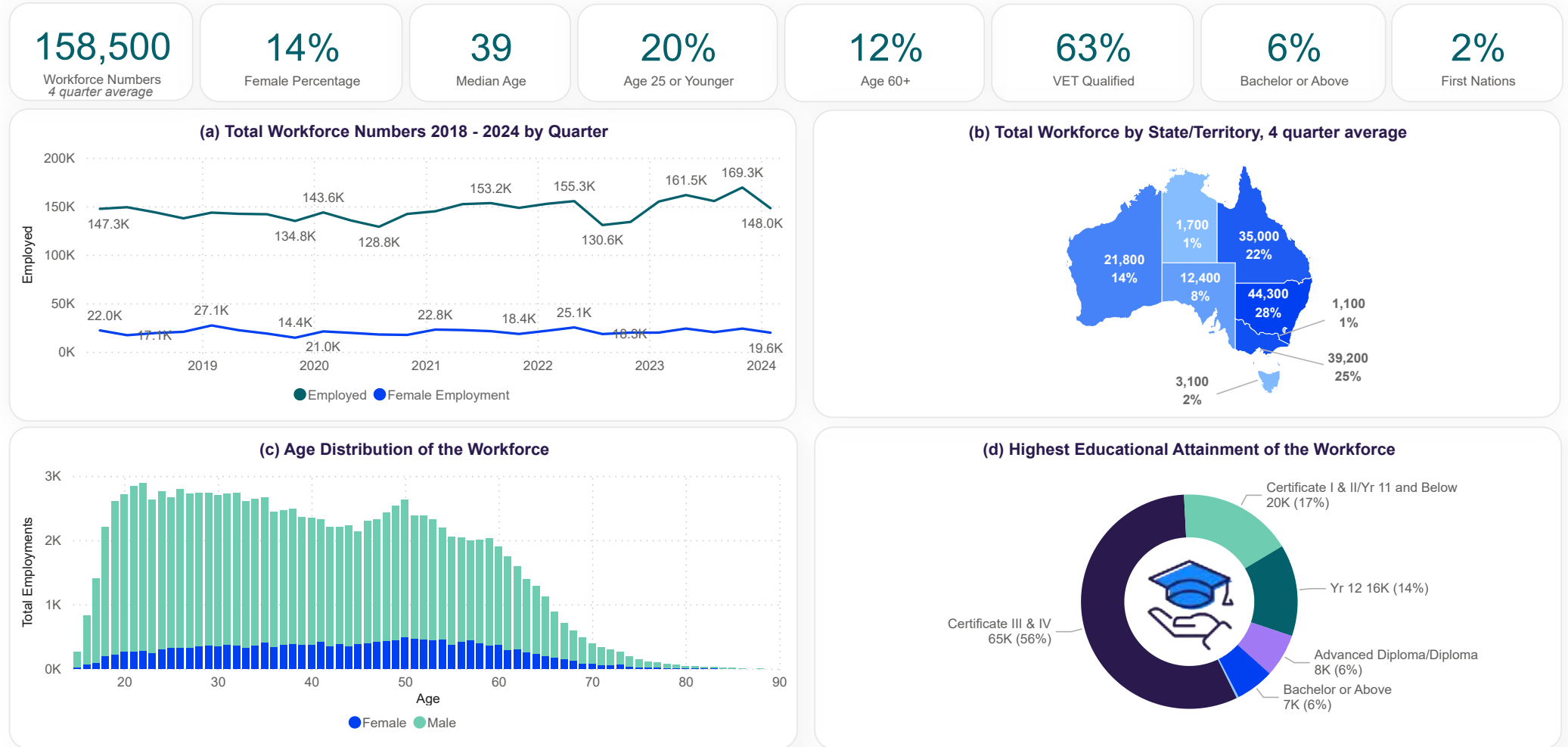
<sup>208</sup> Australian Automotive Aftermarket Association. *Future Readiness Index - Summary Pack - August 2023, 2023.*

<sup>209</sup> Capricorn Society. *State of the Nation 2022, 2022.*



# Automotive repair and maintenance demographic insights

Figure 43: Automotive repair and maintenance demographic insights

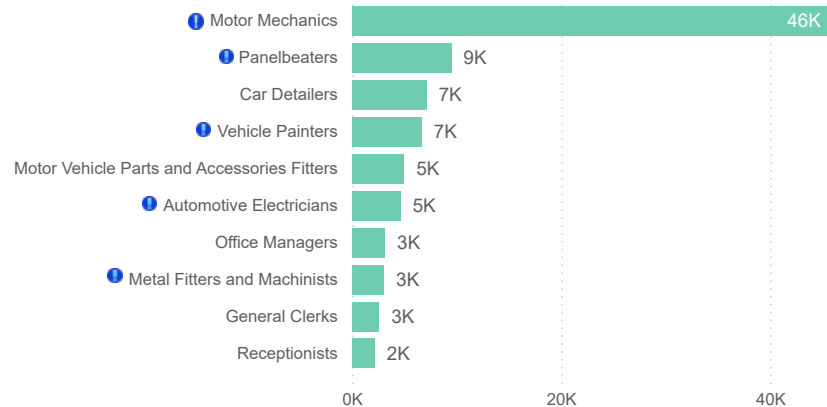


Sources: **(top row)** Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, Four-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 3-digit level INDP Industry of Employment **(a)** ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 **(b)** ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 **(c)** Census of Population and Housing (AGEP Age and SEXP Sex), 2021, TableBuilder **(d)** Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder **Notes:** Workforce Numbers are rounded to the nearest 100.  
Image Source: Auto Repair MTA - Nissan Academy-51

# Automotive repair and maintenance occupation insights

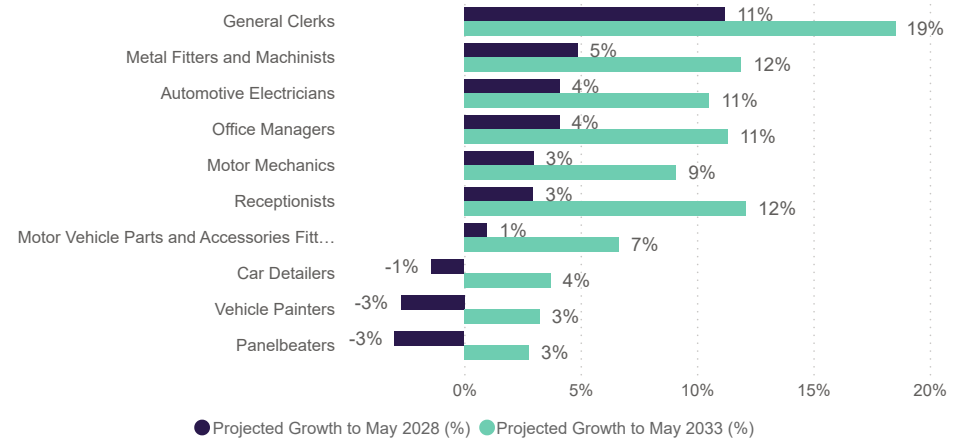
Figure 44: Automotive repair and maintenance occupation insights

(e) Top 10 ANZSCO Occupations by Workforce Numbers

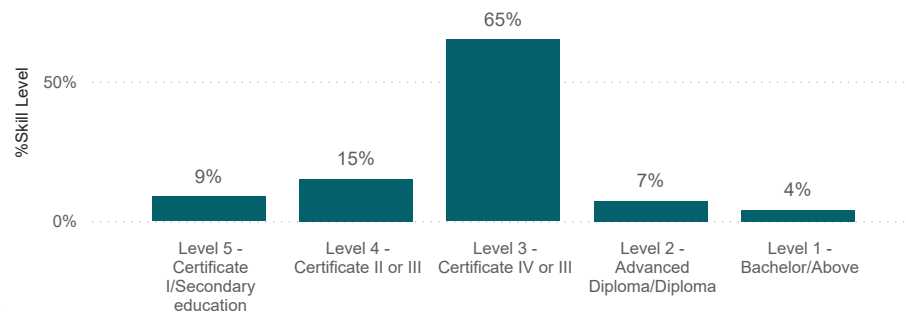


Identified as experiencing National Shortage

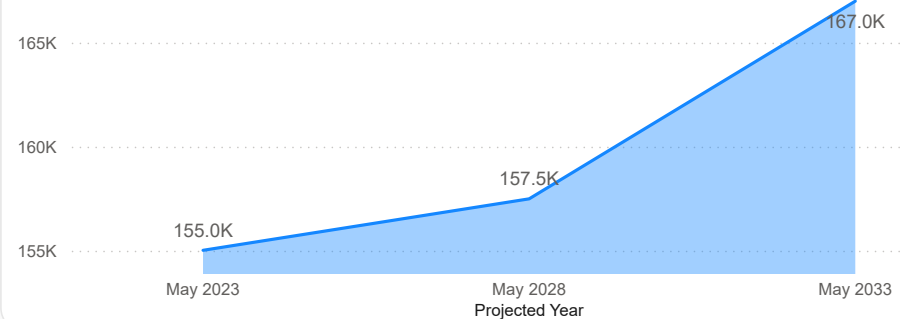
(f) Employment Projections by ANZSCO Occupations



(g) Automotive Repair and Maintenance Workforce Occupation Skill Level Commensurate with



(h) Employment Projections of Automotive Repair and Maintenance



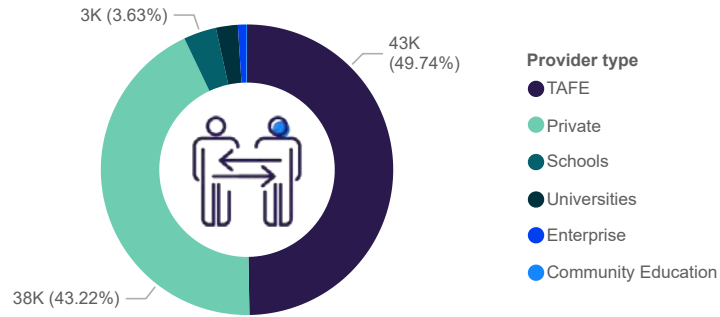
Sources: (e) ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL(ANZSCO 2013) (f) Employment Projections produced by VU for JSA (May 2023 to May 2033) (g) ABS Table Builder 2021 Census - employment, income and education (OCSKP Occupation Skill Level by INDP Industry of Employment) (h) Employment Projections produced by VU for JSA (May 2023 to May 2033)

Image Source: Auto Repair MTA - Nissan Academy-51

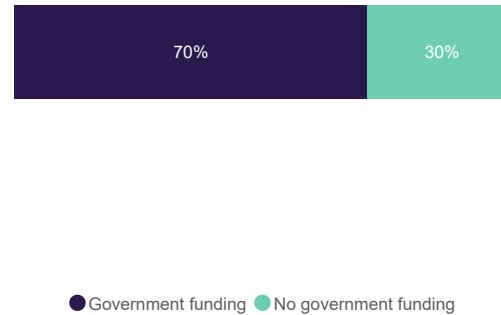
# AUR service and repair training package insights

Figure 45: Automotive service and repair training package insights

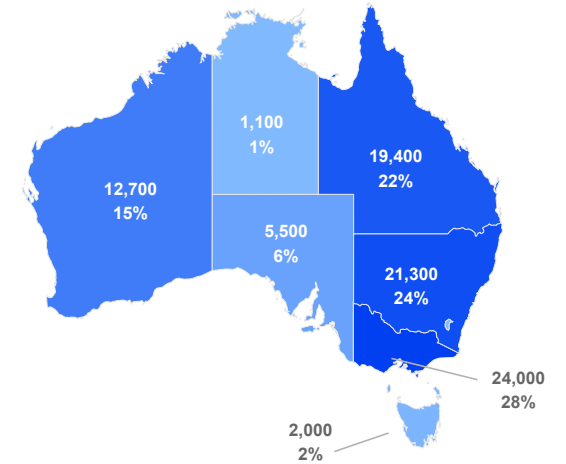
(i) Enrolments by Type of Training Providers



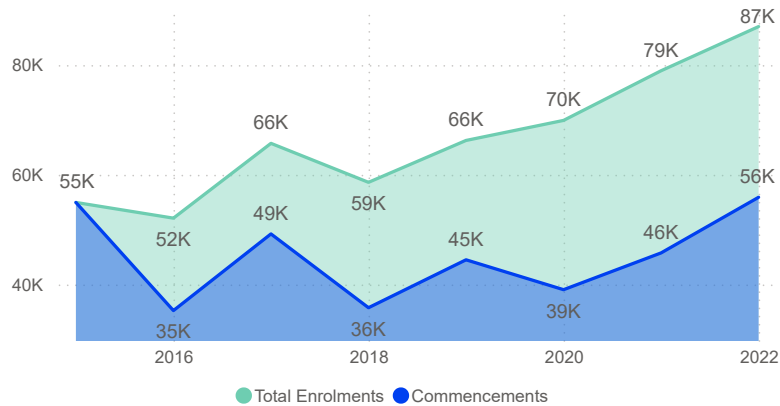
(j) Enrolments by Funding sources



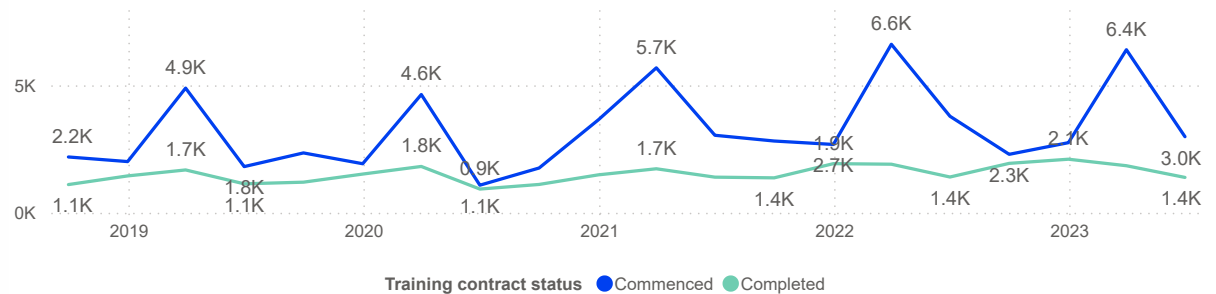
(k) Training Program Delivery Location



(l) AUR Service and Repair Annual Enrolments and Commencements



(m) AUR Apprentices and Trainees Commencement and Completion by Quarter



Sources: (i) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (j) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (k) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (l) NCVER. 2023. TVA program enrolments 2015-2022 (VOCSTATS). Adelaide, December (m) NCVER. 2023. Apprentices and trainees, Sep 2018 - Jun 2023 (VOCSTATS). Adelaide **Note:** 1. Figure (m) Apprentices and Trainees commencements and completions are rounded to nearest 5. 2. Figure (k) are rounded to nearest 100.

Image Source: Auto Repair MTA - Nissan Academy-51



## Automotive repair and maintenance demographics

The automotive repair and maintenance sector employed 158,500 workers across auto electrics, mechanical servicing and repair, panel repair and vehicle painters as of February 2024 (based on a 4-quarter average), with motor mechanics accounting for 28.2% of all roles. If the 14,000 motor mechanics counted as part of the [automotive retail and wholesale](#) sector were included in this sector, the total workforce would be 172,536, with motor mechanics making up 35% of the workforce (approximately 60,000 in total).

The automotive repair and maintenance sector consists of 27,704 businesses involved in the repair and maintenance of vehicles, 13,907 automotive body, paint and interior repair businesses and 3,487 automotive electrical service businesses.<sup>210</sup>

The workforce size has been largely stable over the last 5 years, with projected growth over the next 10 years estimated to equate to 12,000 additional positions.<sup>211</sup>

The stable workforce numbers are not linked to a lack of demand for the sector's services in the economy, but rather the difficulty that the sector has in growing overall workers due to the prevalence of skills shortages in key occupations. Half of the sector's top 10 occupations are identified as experiencing a skills shortage, covering key trade roles such as motor mechanics, panel beaters, vehicle painters, automotive electricians and machinists.<sup>212</sup>

Research by the AAAA has suggested that the repair and maintenance sector is lacking almost 40,000 technicians, 27,000 qualified and 12,000

Figure 46: Automotive Electrical Services Businesses (No. of Employees)

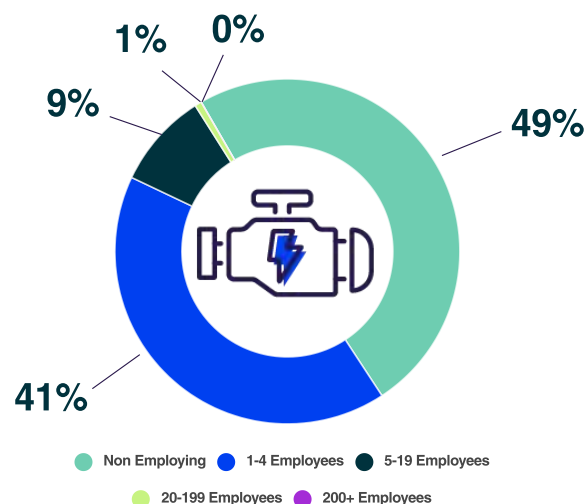


Figure 47: Automotive Body, Paint and Interior Repair Businesses (No. of Employees)

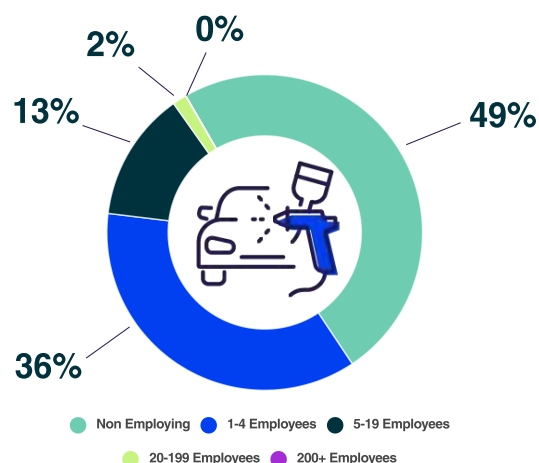
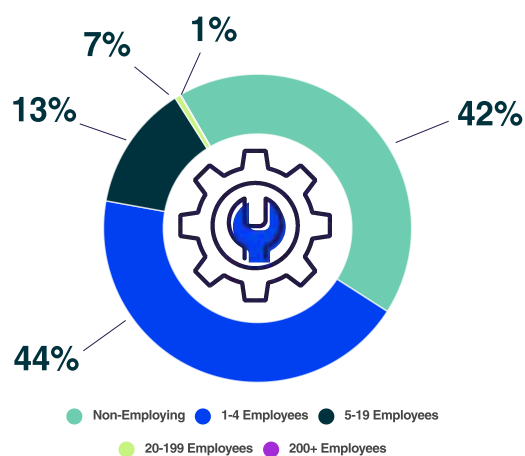


Figure 48: Automotive Repair and Maintenance Businesses (No. of Employees)



Source: Australian Bureau of Statistics. Counts of Australian Businesses, including Entries and Exits. 2023

210 Australian Bureau of Statistics. *Counts of Australian Businesses, including Entries and Exits. 2023*

211 Jobs and Skills Australia. *'Employment Projections'. 2023*

212 Jobs and Skills Australia. *'Skills Priority List'. 2023*

apprentices.<sup>213</sup> In the absence of these staff, a survey of automotive businesses by the Capricorn Society found a number of key impacts of having insufficient staff – including increased workload, longer hours, not having a work-life balance, inability to take time off or holidays, and increased pressure on business owners and staff (stress, fatigue)<sup>214</sup> – which could indicate how skills shortages can lead to self-reinforcing effects.

*inability to take time off or holidays, and increased pressure on business owners and staff (stress, fatigue) - which could indicate how skill shortages can lead to self-reinforcing effects*

Findings from Capricorn Society's 2023 State of the Nation special report into the skills shortage have suggested that it is taking automotive repair and maintenance businesses an average of 6 to 8 months to fill each vacancy.<sup>215</sup> A recent MTAA member survey found that the industry had an average recruitment fill rate of only 39% (Figure 32) across a range of advertised key occupations<sup>216</sup> – 28 percentage points below the 67% level used by Jobs and Skills Australia to help define occupational shortages.<sup>217</sup>

*the industry had an average recruitment fill rate of only **39%** across a range of advertised key occupations – **28 percentage points** below the **67%** level used by Jobs and Skills Australia to help define occupational shortages*

While AAAA, Capricorn Society, and MTAA data differ from that used by Jobs and Skills Australia to identify skills shortages, they still serve as a key snapshot and comparator for ongoing skills shortages at an industry—and role-specific level. At the same time, they and other industry data can also indicate the pervasiveness of skills shortages and their potential for self-reinforcing effects.

213 Australian Automotive Aftermarket Association. *Half of all automotive workshops looking for staff*. 2023.

214 Capricorn Society. *State of the Nation 2022*. 2022.

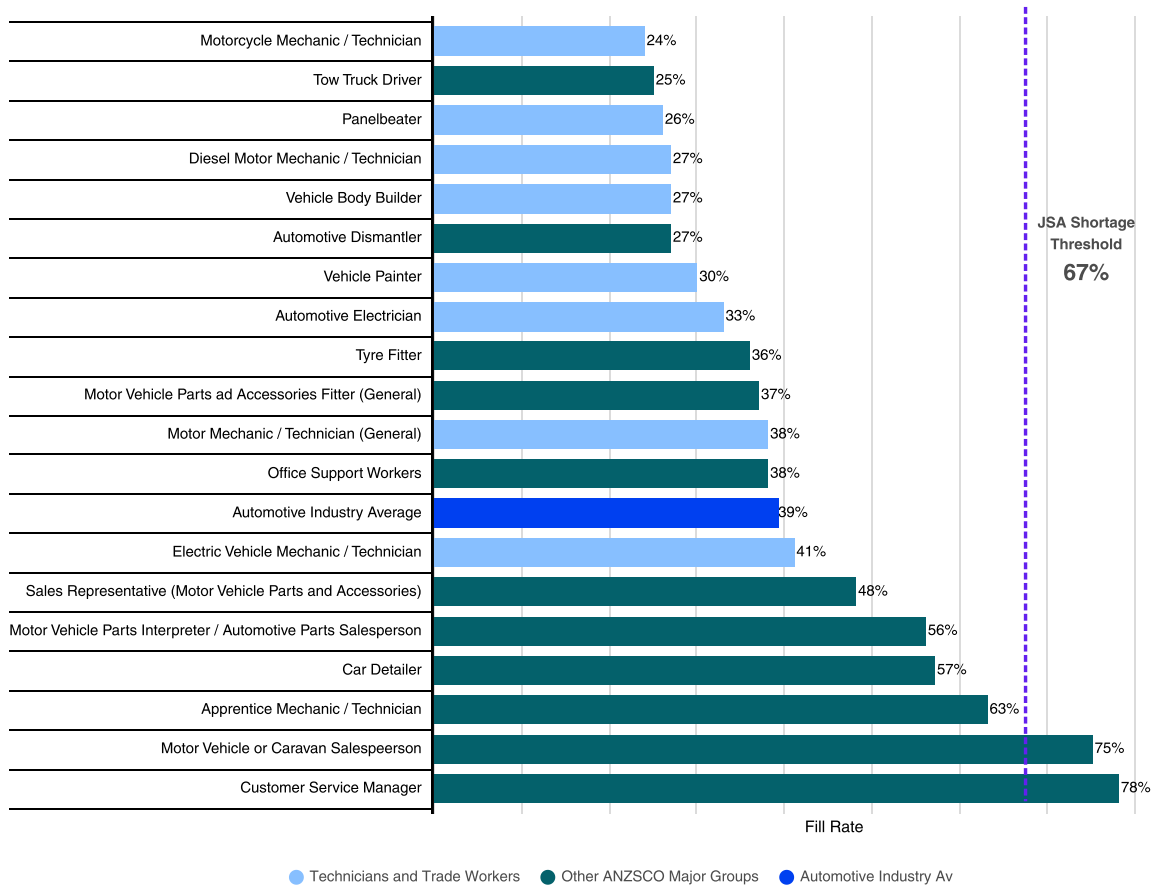
215 Capricorn Society. *State of the Nation – Finding Talent*. 2023.

216 Deloitte Access Economics with Motor Traders Association of Australia. *Skills shortages in the Australian automotive industry*. 2024.

217 Jobs and Skills Australia. *Skills Priority List Methodology*. 2023.



**Figure 49: Automotive Industry Occupation Recruitment Fill Rates**



Source: Deloitte Access Economics. Skills shortages in the Australian automotive industry. 2024.

Motorcycle mechanics, which are a subset of motor mechanics within the ANZSCO classification system, are also identified as experiencing a skills shortage. The 2021 Census reported 1,968 motorcycle mechanics as part of this sector.<sup>218</sup>

2021 Census data shows that this sector also encompasses at least 1,700 bicycle mechanics,<sup>219</sup> who have specific training programs available but are not strictly required. ANZSCO classifies bicycle mechanics as a Skill Level 5 occupation, excluding it from consideration as part of the Skills Priority List. Feedback from the Bicycle Industries Association suggests the sector has closer to 3,000 bicycle mechanics, with at least 500-1,000 vacancies.

Automotive repair and maintenance occupations are geographically dispersed largely in line with Australia’s population distribution, making a career in these occupations possible in most population centres and ensuring high career mobility.

*Capricorn Society’s 2023 State of the Nation special report into the skills shortage have suggested that it is taking automotive repair and maintenance businesses an average of 6 to 8 months to fill each vacancy*

218 Australian Bureau of Statistics. Data Builder – 2021 Census – 6-Digit ANZSCO Occupations. Accessed 2024

219 Australian Bureau of Statistics. Data Builder – 2021 Census – 6-Digit ANZSCO Occupations. Accessed 2024



*One area where the automotive repair and maintenance sector strongly underperforms is female workforce participation. Only **13.78%** of the sector's workforce is female, making it the worst-performing sector within the mining and automotive industries.*

*Worryingly, based on the enrolment statistics of this sector's most common qualifications, only **6.41%** of current students are female. This makes it likely that the current rate of female workforce participation could slip further.*

One area where the sector performs better than any other in the mining and automotive industries is in attracting younger workers. 19.92% of the workforce is aged 25 or younger, a statistic likely influenced by the fact that most of the top occupations for this sector are trades that are completed via an apprenticeship pathway. The sector has 11.56% of its workforce aged over 60, a cohort that is likely approaching retirement in the coming years. On this basis, the attraction of new workers has been successful in at least keeping the workforce numbers stable.

Given the propensity toward trade occupations within this sector, it is not surprising that VET qualifications account for over half of the workforce by education level. Conversely, this sector has the lowest level of higher education-qualified workers (6%) across the mining and automotive industries.

Enrolments within key AUR qualifications that support this sector are strong and growing – 2022 statistics show 87,000 total enrolments and 56,000 commencements in relevant qualifications. The increased gap between commencing and actively enrolled students suggests AUR qualifications may be taking longer to complete since COVID. Nevertheless, enrolment demographics broadly correlate to Australia's population distribution, with TAFEs being a dominant provider of education and over two-thirds of training being conducted by way of government funding.

## Automotive repair and maintenance workforce drivers

### Workforce attraction and retention

The automotive repair and maintenance sector workforce faces unique challenges in attracting and retaining the skilled workers it needs. Attracting more apprentices to the industry is key to addressing the current skills shortages.

While many of the key occupations needed by the sector require trade qualifications, the resulting wages earned by these trade-qualified workers are often less than those of other trades.

For example, research commissioned by the AAAA showed that the average apprentice automotive technician earned \$40,000 per year, compared to an average of \$55,000 for apprentice plumbers, electricians and carpenters.<sup>220</sup> Once qualified, the pay gap improved marginally but automotive technicians (\$72,000 per annum) still lagged plumbers (\$76,000 per annum), electricians (\$89,000 per annum) and carpenters (\$97,000 per annum).

Most industries that are dependent on a highly trade qualified workforce grapple with the competition for talent that plays out between young people choosing either a higher education pathway or selecting to study a trade within a VET qualification pathway.

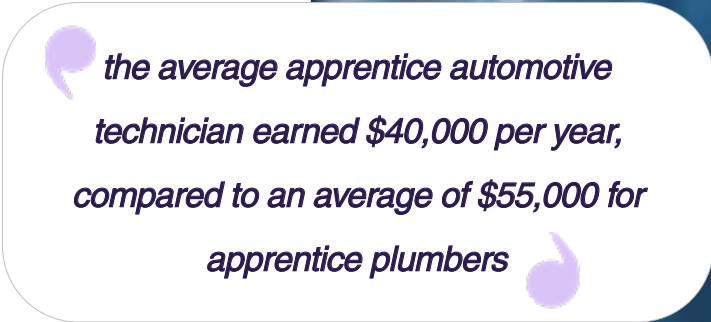
For the automotive industry, if someone is open to choosing a trade for their vocation, the additional challenge comes from the fact that among trades, automotive occupations tend to pay far less.

When questioned at a recent AUSMASA online workforce planning workshop, 75% of automotive stakeholders believed that low pay compared to other trades and industries was one of the top 2 reasons why attracting new talent to the industry was difficult.

This industry feedback is corroborated by recent research undertaken by JSA into difficulties faced by employers when recruiting apprentices. JSA's Recruitment Experiences and Outlook Survey found that, particularly for apprenticeships in streams such as motor mechanics, the reasons why industry felt they had insufficient numbers of applicants was tied to competition with other industries, of which non-competitive wages was a factor.<sup>221</sup>

<sup>220</sup> Australian Automotive Aftermarket Association. Technician Salary Benchmarking Research. 2023.

<sup>221</sup> Jobs and Skills Australia. *REOS spotlight: Employers' experiences recruiting for apprentices*. 2024.



*the average apprentice automotive technician earned \$40,000 per year, compared to an average of \$55,000 for apprentice plumbers*

While the choice of potential future trade occupations is no doubt formulated on multiple considerations and not just future earnings, this pay gap would not be helping, especially given that a recent longitudinal survey of Australian youth found that 28% of 21-year-olds were in financial stress.<sup>222</sup>

One area where industry feels a change by government could make a positive difference is in the occupation name used by ANZSCO for some of its top occupations. The automotive industry has for some time now adopted the term Automotive Technician, however ANZSCO still uses the terms Motor Mechanic and Diesel Mechanic to define occupations. These titles are used by RTOs and Australian Apprenticeship Support Network (AASN) providers on any official material and paperwork for apprenticeship programs, which are what prospective apprentices, and their parents, rely on when choosing a program of study.

Industry feels strongly that the terms Motor Mechanic and Diesel Mechanic are detractors and perpetuate outdated views of their vocation. Recent feedback from Komatsu would suggest that occupation naming can have a big impact. When their recruitment drive for apprentice Mobile Plant Mechanics was not yielding a strong flow of candidates, Komatsu adjusted their recruitment campaigns to call for Mobile Plant Technicians and the response was significantly better.

*Komatsu adjusted their recruitment campaigns to call for Mobile Plant Technicians and the response was significantly better*

### AREA OF FOCUS

The ABS should consider adjusting its terminology within ANZSCO to replace the word 'mechanic' with 'technician'.

222 NCVER. *Generation Z: life at 21*. 2022.





Many automotive tradespeople, especially those working in mining-intensive states such as Western Australia and Queensland, are finding that continuing their trades within the mining industry can yield significantly higher salaries. While such movement of labour assists the mining industry in meeting its workforce needs, it does create additional strain on the automotive industry, which represents the bulk of employers supporting apprentices to enter the automotive industry.

Feedback from industry stakeholders has shown that some businesses within the automotive repair and maintenance sector are responding with a range of innovative solutions. One metropolitan Western Australian workshop offered to mimic a FIFO roster for its staff, while another offered staff choosing to work in the mines the opportunity to return in the future with employee benefits such as long service leave accruals still in place. Feedback to AUSMASA from that business owner indicated they felt that for many technicians, the desire to earn good money in the mines was too hard to compete against but that invariably, many tire of the added pressures of FIFO work and returned after a few years.

## Mentorship of apprentices

Given the importance of apprentices in building the automotive repair and maintenance workforce, ensuring their success once attracted is paramount.

NCVER completion data for apprenticeships that commenced in 2018 reflect a national average completion rate of 55.8% across all occupations within 3-4 years. The automotive trades cohort fared slightly better, with 58.1%, compared to an average rate of 53.4% for all trade apprenticeships.<sup>223</sup> This trend is also relatively consistent with the most recent pre-COVID data, which shows that 62% of those who commenced in the automotive trades in 2016 completed their apprenticeship within 4 years.<sup>224</sup> The failure of almost every second apprentice to complete within the standard 4-year timeframe for apprentices is one area that requires the VET and industry sector's ongoing attention.

During a recent AUSMASA national online workforce planning workshop, automotive industry stakeholders were asked the question: 'Aside from the apprentice themselves, who has primary responsibility for an apprentice's education and skills development?' 82% responded that this lay with the employer as opposed to the training provider.

223 NCVER. Completion and attrition rates for apprentices and trainees 2022: data tables. Adelaide, November. 2024.

224 NCVER. Completion and attrition rates for apprentices and trainees 2020: data tables. Adelaide, July. 2021.

Numerous training providers involved in the provision of automotive apprenticeship programs have expressed concern to AUSMASA that, due to the chronic skills shortage in the sector, insufficient workplace mentorship, coaching and support is being provided. Feedback by these training providers suggests that workshops are too understaffed to offer truly holistic support of an apprentices' development, noting that trainers are often required to assist students with tackling non-training related issues such as struggles in their personal lives. This has led many training organisations to feel as though the primary responsibility of mentoring and supporting an apprentice has been transferred back to them.

AUSMASA's broader industry engagement activities support the view that the industry is aware of its own critical role in developing apprentice skills and providing coaching and pastoral care. The industry is under pressure from the ongoing skills shortages. While AASN providers are contracted by the government to provide mentoring services to apprentices, industry feedback suggests this is either lacking or superficial at best.

The federal government has trialled various other approaches to the provision of mentoring services in the past, including via the Industry Specialist Mentoring for Australian Apprentices (ISMAA) program. While this program has been discontinued, feedback from the industry suggests that it added tangible benefits to the apprentices supported at the time.

### AREA OF FOCUS

Consideration by government in relation to how industry can be better supported in the critical role of apprenticeship mentoring and support is seen as critical to improving retention and graduation rates. AUSMASA will continue to work with industry to advocate for government support that is targeted, and outcomes based.

Another issue raised by both training providers and employers concerns the lack of adequate language, literacy, numeracy, and digital (LLND) skills in apprentices entering the VET system. Consistent feedback from the industry has been that apprentices struggle with work-related literacy and numeracy tasks such as reading, interpreting, and applying service instructions.

Many training providers have also expressed the view that they are increasingly having to spend considerable and valuable training time dealing with LLND barriers.







In its submission to DEWR's *Future Directions* consultation paper, the Reading Writing Hotline advised that they currently receive over 4,000 calls annually from adult learners, of whom 40% are already employed and 70% are from an English-speaking background and were schooled in Australia.<sup>225</sup> In light of this, the submission, among other recommendations, extolled the value of industry introductory pathway programs in easing learners into apprenticeship courses.

The issue of LLND barriers and the role of pathway programs was also a key topic of discussion at AUSMASA's Critical Minerals and Electric Vehicles Skills Forum, held in October 2023. Industry stakeholders argued that the current Certificate II pathway programs in the AUR training package, while providing a broad introduction to the industry, did little to prepare students for the literacy and numeracy skills that they would need once they progressed to an apprenticeship.

### AREA OF FOCUS

AUSMASA will work closely with industry to explore how automotive pathway programs can be better designed to address LLND barriers in addition to introducing industry skills and tasks.

## International students

While new entrants to the automotive industry are needed, it is critical that they have the skills and experience required to meet employers' expectations. For Australian citizens and permanent residents seeking an automotive trade, this is achieved through a 4-year apprenticeship that blends structured training from TAFEs and private training providers with on-the-job training in the workplace from day one.

This is not the case with international students, many pay tens of thousands of dollars to complete the same trade-based qualification in as little as one year, with no mandated time in a workplace.

The Certificate III in Light Vehicle Mechanical Technology is the industry's primary educational mechanism for training new automotive technicians. 2022 data shows that of the 26,745 enrolments in this qualification, 7,245 (27%) were from international students, [Appendix I](#).

The qualification does not mandate any minimum number of hours that need to be spent in the workplace. For those students completing the

<sup>225</sup> Reading Writing Hotline. Submission to the Department of Employment and Workplace Relations *Future Directions* consultation paper. 2023.

program via an apprenticeship stream, hours in the workplace are guaranteed. International students generally cannot complete apprenticeships due to the eligibility rules:

- Being an Australian citizen or permanent resident; and
- Seeking an apprenticeship with full-time or part-time hours
- Over 18 years old (or with approval from a guardian if you are under 18 years old).

A temporary resident or Visa holder may be able to start an apprenticeship if they meet specific skills listed by the Department of Home Affairs however, a place is not guaranteed.

*Industry has expressed concerns about the lack of on-the-job experience that international students are receiving and the perceived lack of quality in training delivery provided by many private training providers*

Overlaid with the eligibility requirements are the restrictions on the number of hours that can be worked by international students, which means an Australian apprenticeship with its mandated work hours is largely out of reach for international students. Consequently, the amount, if any, of on-the-job experience or work placements that international students receive varies greatly depending on the training provider.

Industry has expressed concerns about the lack of on-the-job experience that international students are receiving and the perceived lack of quality in training delivery provided by many private training providers.

As a result, the industry has raised significant concerns about the lack of actual experience that international student graduates are bringing to the workforce. Many indicate that despite holding the required qualifications, graduates can rarely be employed as skilled automotive technicians.

The automotive industry has indicated to AUSMASA that it is broadly supportive of international students being allowed to study qualifications such as the Certificate III in Light Vehicle Mechanical Technology via an apprenticeship-type model, with the granted exception being that government incentives normally available for both apprentices and employers not be offered. The current conditions placed on student visas would need adjustment to make such a model feasible.

Another approach would be for AUSMASA to investigate changes to key AUR qualifications by embedding specific requirements for mandated hours in the workplace for non-apprenticeship students. This would provide confidence from employers that graduating international students have completed mandatory on-the-job work placements.

## AREA OF FOCUS

AUSMASA will investigate the possibility of embedding specific requirements for mandated workplace hours in key AUR qualifications to ensure that students undertaking them outside of an apprenticeship pathway are provided the opportunity to apply their learnings and gain actual industry skills.

## Electric and hydrogen vehicles

The Australian Government first introduced and consulted on a new National Electric Vehicle Strategy in late 2022, before it committed to implement a specific New Vehicle Efficiency Standard following public consultation in early 2023.<sup>226</sup> As a core Government strategy, it created a framework for a range of actions designed to lower EV costs – such as changes to fringe benefits tax and import tariff arrangements.<sup>227</sup>

In 2023, the Australian transport sector produced 21% of Australia's total greenhouse gas emissions. Overall, cars make up about 60% of transport emissions.<sup>228</sup> Changes to efficiency standards and other policy initiatives aim to assist Australia in achieving its net-zero ambitions by encouraging the rapid adoption of new EVs and creating a second-hand market for EVs to lower entry costs. Without such interventions, the transport sector is projected to become Australia's largest emitting sector by 2030.<sup>229</sup>

Over the last 4 years, state and territory governments have also produced strategies with actions designed to make EVs and charging infrastructure more affordable – including introducing new grant funding, rebates, subsidies, and changes to stamp duty and registration costs.<sup>230</sup> As the National Electric Vehicle Strategy outlined, national coordination was lacking until recently.<sup>231</sup>

In addition to existing policies to increase the demand for EVs, the introduction of Australia's New Vehicle Efficiency Standard will mean Australian motorists can choose from a wider range of more efficient, modern vehicles, including more EVs.<sup>232</sup>

As of March 2024, the total number of EVs on Australian roads is estimated at 208,000. EVs accounted for 8.4% of all new light vehicle sales in 2023 (battery electric vehicles (BEVs) and plug in hybrid electric vehicles (PHEVs)), compared with 3.8% in 2022. In the first 3 months of 2024, EVs (both BEV and PHEV) accounted for 9.9% of all new light vehicles sales.<sup>233</sup> Despite this increase, Australia still lags other markets. In the European Union, EVs accounted for approximately 22.3% of sales in 2023.<sup>234</sup>

<sup>226</sup> Department of Infrastructure, Transport, Regional Development, Communication and the Arts. *Cleaner, Cheaper to Run Cars: The Australian New Vehicle Efficiency Standard*. 2024.

<sup>227</sup> Department of Infrastructure, Transport, Regional Development, Communication and the Arts. *Cleaner, Cheaper to Run Cars: The Australian New Vehicle Efficiency Standard*. 2024.

<sup>228</sup> Department of Climate Change, Energy, the Environment and Water. *National Electric Vehicle Strategy*. 2023.

<sup>229</sup> Department of Climate Change, Energy, the Environment and Water. *Australia's emissions projections 2023*. 2023.

<sup>230</sup> Department of Climate Change, Energy, the Environment and Water. *National Electric Vehicle Strategy*. 2023.

<sup>231</sup> Department of Climate Change, Energy, the Environment and Water. *National Electric Vehicle Strategy*. 2023.

<sup>232</sup> Department of Infrastructure, Transport, Regional Development, Communication and the Arts. *New Vehicle Efficiency Standard introduced*. 2024.

<sup>233</sup> Federal Chamber of Automotive Industries, *VFACTS report*, March 2024.

<sup>234</sup> European Automobile Manufacturers' Association, *New EU Car Registrations*, 2024.



In addition to EVs (including PHEVs), the continued growth of hybrid vehicle sales has seen electric power and driveline technology resulting in a further 377,265 vehicles since the start of 2019.<sup>235</sup> Supporting sales growth will be changes to tax treatments, such as the Electric Car Discount Bill announced in 2022 and other changes at the state and territory level.

The future composition of Australia's vehicle fleet will increasingly be electric, representing the single biggest transformation of the automotive industry in over 100 years. As such, the service and repair sector need to be prepared to support and adapt to changing skills requirements.

There are varying indicators of industry preparedness when it comes to servicing EVs. Capricorn Society's 2022 State of the Nation survey found that 22% of respondents viewed EVs as a challenge for the industry, with only 18% considering themselves currently, or soon to be, ready to service them.<sup>236</sup> This sentiment was echoed in Capricorn's 2021 and 2020 State of the Nation surveys, indicating little progress in the industry on this issue. AAAA's Future Readiness Index – a measure of business planning for an electric future – suggests that half of Australian workshops are actively investing in the skills and equipment needed to service EVs and one in ten are already set up for an electric future.<sup>237</sup>

In addition to investing in physical infrastructure to support the servicing of EVs, appropriate training for technicians will be critical. There are currently 2 skill sets and one dedicated qualification within the AUR training package designed to help equip current and future technicians with the skills they need to safely service and repair EVs:

- AUR32721 Certificate III in Automotive Electric Vehicle Technology
- AURSS00063 - Battery Electric Vehicle Diagnose and Repair Skill Set
- AURSS00064 - Battery Electric Vehicle Inspection and Servicing Skill Set

The 2 skill sets are currently the primary method of upskilling existing technicians, with the AUR32721 Certificate III in Automotive Electric Vehicle Technology being utilised for new entrants to the automotive industry who wish to specialise in EV servicing. The magnitude of upskilling the existing workforce to work on EVs, coupled with the average cost to do so (\$5,000 to \$7,000 per technician), has led the MTAA to call for the easing of requirements linked to the government's new energy apprenticeship program.<sup>238</sup>

<sup>235</sup> Bureau of Infrastructure and Transport Research Economics. *Road Vehicles, Australia January 2023*. 2023.

<sup>236</sup> Capricorn Society. *State of the Nation 2022*. 2022.

<sup>237</sup> Australian Automotive Aftermarket Association. *Future Readiness Index – Summary Pack – August 2023*. 2023.

<sup>238</sup> Elias Visontay. *Australia's skilled mechanics shortage forcing insurers to write off electric vehicles after minor accidents*. The Guardian. 2024.

22% of respondents viewed EVs as a challenge for the industry, with only 18% considering themselves currently, or soon to be, ready to service them.



The AUR32721 Certificate III in Automotive Electric Vehicle Technology does not equip students with the skills required to service and repair internal combustion engines (ICE), while the AUR30620 Certificate III in Light Vehicle Mechanical Technology focuses students on the skills required to service and repair ICE engines with some opportunity to cover topics specific to EVs.

Given that, despite growing EV sales, the coming decades will see a mix of both ICEs and EVs on Australian roads needing service and repair, a training solution that does not require a dual qualification to produce a truly versatile automotive technician should be explored.

This topic was discussed at a recent AUSMASA online workforce planning workshop, where automotive stakeholders were asked:

‘For the immediate future, which will continue to have a blend of both ICE and electric vehicles, the best way to support the maintenance and repair workforce is by...’

The response from stakeholders, from the available choices given, was:

- ✓ **6.9%** Having separate specialist qualifications for each discipline.
- ✓ **13.8%** Having a new qualification that covers both disciplines.
- ✓ **79.3%** Having a baseline qualification supported by a range of specialised skill sets.

### AREA OF FOCUS

AUSMASA will collaborate with the industry to determine how the AUR training package can best support the introduction of ICE and EVs in an evolving repair and maintenance environment.

### AREA OF FOCUS

AUSMASA will work with the ABS through its review of ANZSCO to advocate for the addition of EV Technician to the occupation list.

Another ongoing discussion, with consequences for both the automotive and mining industries, concerns the possibility that some form of restricted electrical licence may become necessary for future work on EVs and electric mobile plant equipment. Recent consultations around this matter in Queensland considered whether such work should require a full electrical licence, which was not supported by the automotive industry.





Electric and hybrid vehicles also have unique safety requirements, especially for first responders such as firefighters, police, and tow truck operators in the case of a collision. Currently, there is no accredited training available for first responders in the VET system, with some training providers offering unaccredited training.

AUSMASA understands that Public Skills Australia (PSA), the JSC responsible for public safety, is investigating the development of an accredited training program for EV safety and emergency response. AUSMASA will ensure any program considers the needs of the automotive industry, especially those involved in accident repair.

### AREA OF FOCUS

Given the automotive industry's safety needs and their intersection with accident repair, AUSMASA will collaborate with PSA to investigate the development of an accredited training program for EV safety and emergency response.

An important aspect of the maturing battery-electric landscape is the need to consider end-of-life recycling. Current EV batteries are neither easy nor economical to recycle.<sup>239</sup> To ensure the many critical minerals that have gone into each battery are not wasted, nor the environmental gains achieved during the life of the battery, governments are working on introducing recycling requirements.<sup>240</sup> This emerging skill will need to be passed on to workers who handle end-of-life vehicles.

### AREA OF FOCUS

AUSMASA will work closely with industry to explore what unique skills are required for the dismantling and recycling of EV vehicles in an end-of-life setting.

Hydrogen presents as another promising fuel technology, which, depending on the energy source used to produce it, can be considered either low emission or zero emission in nature. As such, the Australian Government is assisting the development of a domestic hydrogen industry through the Guarantee of Origin Scheme and the Hydrogen Headstart and Regional

239 Ian Morse. 'A Dead Battery Dilemma'. Science, 372, no. 6544. 2021.

240 Ian Morse. 'A Dead Battery Dilemma'. Science, 372, no. 6544. 2021.

Hydrogen Hubs programs.<sup>241</sup> In addition, in Budget 2024–2025 the Government committed \$8 billion over the next decade to support hydrogen production under its *Future Made in Australia* Initiative.<sup>242</sup> Like the budget measures for critical minerals, most of this funding (an estimated \$6.7 billion) is allocated to a Hydrogen Production Tax Incentive, which will complement the Hydrogen Headstart programs.<sup>243</sup>

Although Australia’s hydrogen industry is still developing, heavy linehaul haulage is seen as the most likely way that hydrogen will enter the automotive industry on any large scale within the foreseeable future.<sup>244</sup> This will create additional opportunities for truck manufacturers in Australia and require new skills for the technicians who service and repair such vehicles. A key enabler that is required prior to the broader adoption of hydrogen as a transport fuel is the establishment of refuelling infrastructure.

### AREA OF FOCUS

There are currently no nationally accredited training programs for the service, repair and safe handling of hydrogen as it relates to vehicles within the VET system. Accordingly, AUSMASA is progressing a project proposal for the development of accredited training elements.

## Scaffolding of learning in support of automotive career paths

2022 enrolment data, [Appendix I](#), supports feedback from stakeholders, namely that the automotive workforce’s primary reliance on the VET sector as an industry is to achieve initial trade qualifications, but it is then underutilised for further career progression and skills development.

That is not to say that the industry does not support, or indeed encourage, further training and skills development. Rather, a large proportion of such post-trade training occurs in the non-accredited space, often led and delivered by Original Equipment Manufacturers (OEMs).

OEM training is often used to upskill technicians in preparation for becoming Master Technicians. While such training is undoubtedly critical, it tends to be manufacturer-specific, leading to technicians being recognised as Master Technicians only for the specific brands for which they have received training.

This is not the case in jurisdictions such as the United Kingdom, where to become a Master Technician, accredited training programs must be completed.<sup>245</sup>



***a large proportion of such post-trade training occurs in the non-accredited space, often led and delivered by Original Equipment Manufacturers (OEMs)***



241 Department of Climate Change, Energy, the Environment and Water. *Electricity and Energy Sector Plan – Discussion Paper*. 2024.

242 Commonwealth of Australia. *Budget 2024–2025 Budget Measures, Budget Paper No. 2*. 2024.

243 Commonwealth of Australia. *Budget 2024–2025 Budget Measures, Budget Paper No. 2*. 2024.

244 Department of Climate Change, Energy, the Environment and Water. *State of Hydrogen*. 2022.

245 Technical Topics. *How do I become a Master Technician (or a Master Mechanic)*. 2024.

The AUR training package does have qualifications at the Certificate IV and Diploma levels designed to assist technicians in developing their technical and supervisory skills. These qualifications are almost entirely used by international students.

The 2022 data shows 4,378 active enrolments for the AUR40216 Certificate IV in Automotive Mechanical Diagnosis, of which 3,937 (90%) were international students. The *AUR50216 Diploma of Automotive Technology* had 2,664 active enrolments in 2022, of which 2,588 (97%) were international students, [Appendix I](#).

OEM and other non-accredited training provide a valuable addition to the training landscape, though if such training limits career mobility or recognition by other employers, there could be a case for considering a better use of the accredited VET system. This is especially important considering the progress being made toward implementing a National Skills Passport, as promoted by the government's Employment White Paper.<sup>246</sup>

AUSMASA's [career pathway mapping project](#) will aim to provide clearer insights into real-world examples of career development and progression within the automotive industry, including how both accredited and non-accredited training programs were used to achieve such outcomes.

## Advanced technologies

The automotive industry worldwide continues to implement new high-technology solutions and systems into vehicles, making the task of workers who service, repair and fit such systems more complicated and digitally reliant.

Modern vehicles are being fitted with advanced driver-assistance systems (ADAS), including radars, multiple cameras, sensors, and sophisticated operating systems, to not only manage safety systems, the engine, transmission and exhaust but also most of the in-cabin functions and experiences.

To the degree that such a modern and digitally enabled industry could assist in enticing new entrants to join, such advances are welcome. They also benefit consumers and road safety in general. The increased presence of sophisticated software and electronic systems also requires the skills of the existing and future workforce to keep pace.

<sup>246</sup> The Treasury. Working Future: The Australian Government's White Paper on Jobs and Opportunities. 2023.







Frequent feedback from the industry to AUSMASA has been that many training providers are failing to keep pace with technology and teaching students on outdated equipment. Equally, some industry participants have lamented the fact that OEMs are reluctant to grant access to their proprietary systems for training providers, requiring all training to be conducted by them, which may not always be possible in all locations.

Increased inclusion of ADAS within modern vehicles is also creating unique challenges for existing AUR training packages. Auto glaziers are increasingly required to replace windscreens, behind which are cameras and other sensors. Such systems require careful calibration to operate effectively. Industry feedback suggests that currently, auto glaziers cannot conduct this calibration process after replacing a windscreen, which puts additional workload strain on technicians to do so. Consequently, AUSMASA is working closely with the industry to determine what changes to the AUR32220 Certificate III in Automotive Glazing Technology qualification or licensing may be required to empower auto glaziers to perform some or all ADAS recalibration tasks.

#### **AREA OF FOCUS**

AUSMASA will continue to work with industry to determine what changes to other qualifications or licensing may be required to empower automotive workers to perform some or all ADAS recalibration tasks.

Technological advancement requires increased digital literacy requirements. It is imperative that the VET sector can support existing workers to keep pace with this change and that qualifications are kept current to remain relevant.

#### **AREA OF FOCUS**

A key priority for AUSMASA will be to work with stakeholders in identifying the digital skills needs of the industry through use of the Australian Digital Capability Framework.

## Automotive retail and wholesale overview

The automotive retail and wholesale<sup>247</sup> sector, with a workforce of over 121,000 (four-quarter average, May 2023 to February 2024), [Figure 43](#), sells vehicles, trucks, buses, motorcycles, bicycles, and tyres, as well as parts and accessories.

Data from industry peak bodies and IBISWorld highlight that there are upwards of 3,575 car dealerships,<sup>248</sup> 697 motorcycle dealerships<sup>249</sup>, 462 truck dealerships<sup>250</sup> and 532 caravan and trailer dealerships<sup>251</sup> in Australia. Insights provided by Bicycle Industries Australia suggest there are approximately 1,000 bicycle retailers, not including large retail department stores such as Kmart.

These businesses are generally geographically distributed in line with Australia's population distribution, servicing metropolitan, rural and remote communities. This makes employment opportunities within this sector broadly available to much of the Australian population.

Car dealerships tend to co-locate, especially in metropolitan areas, which attracts supporting businesses such as parts and tyre retailers and fitters. This often creates localised hubs of employment for the automotive retail and wholesale sectors.

Workers directly involved in the sale of vehicles in Australia require an appropriate motor vehicle salesperson licence, the regulation of which is handled by individual states and territories. While training is required prior to attaining such a licence, this is normally in the form of a short course and is not, by requirement, a full qualification. The AUR package does offer the non-compulsory AUR31020 Certificate III in Automotive Sales qualification, which can often be completed as a traineeship, including prior to the final issue of a motor vehicle salesperson licence.

247 NOTE: While AUSMASA is providing data and a narrative on the automotive wholesaling sector as part of its 2024 Workforce Plan, it should be noted that this sector is officially the responsibility of the Service and Creative Skills Australia (SaCSA) Jobs and Skills Council. The automotive wholesaling sector is expected to become officially part of AUSMASA's responsibility prior to the 2025 Workforce Plan.

248 Federal Chamber of Automotive Industries. *The Australian New Vehicle Industry. 2024*

249 J. Fahey. *Motorcycle Dealers in Australia. 2023*. IBISWorld.

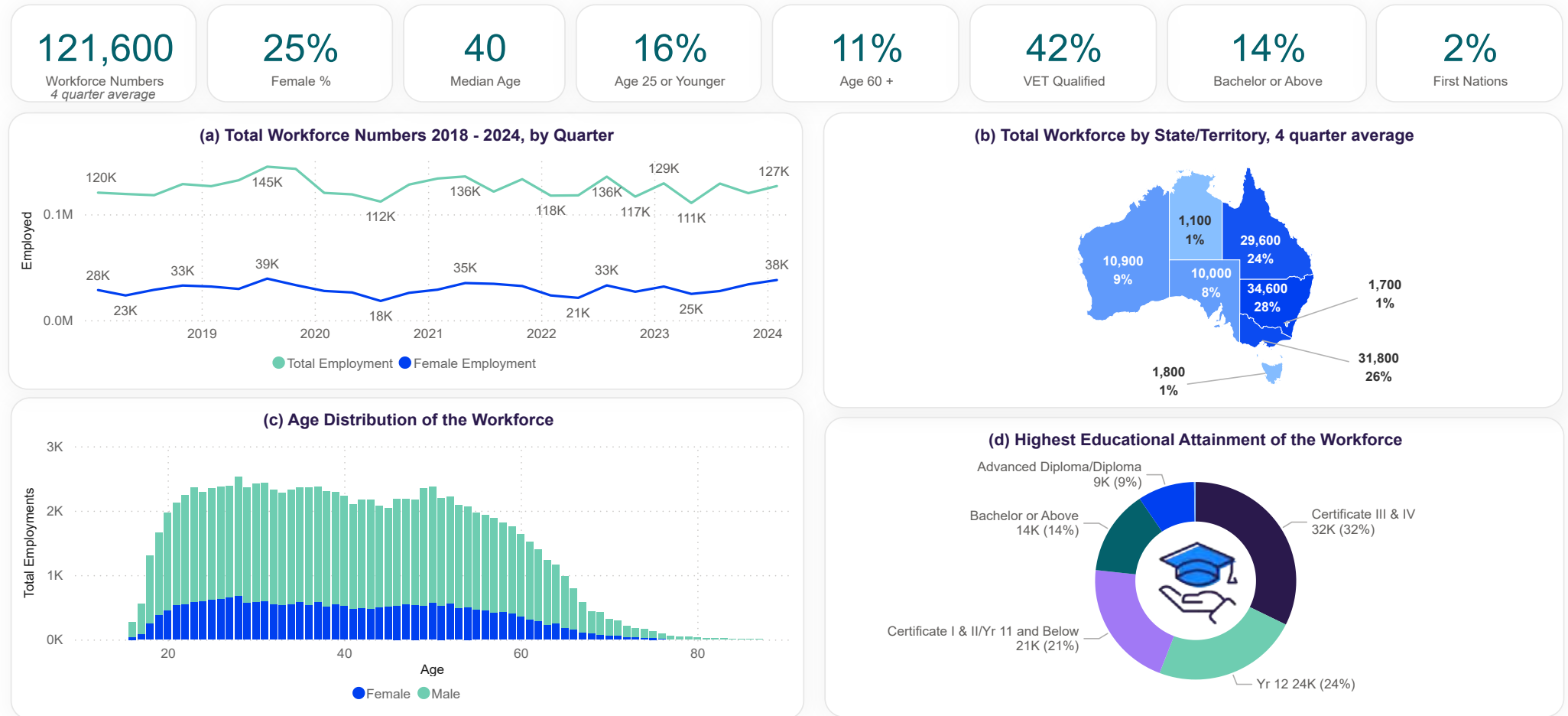
250 IBISWorld. *Truck Dealers in Australia. 2023*.

251 M. Iishi. *Trailer and Caravan Dealers in Australia. 2024*. IBISWorld



# Automotive retail and wholesale demographics insights

Figure 50: Automotive retail and wholesale demographics insights

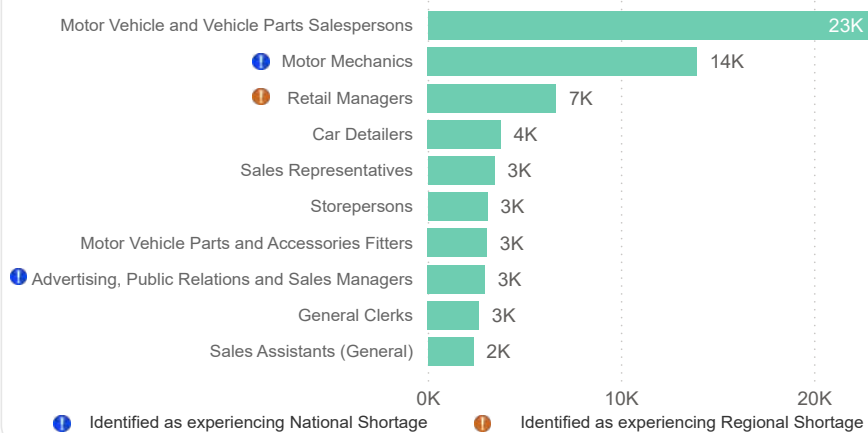


Sources: **(top row)** Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, Four-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 3-digit level INDP Industry of Employment **(a)** ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 **(b)** ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 **(c)** Census of Population and Housing (AGEP Age and SEXP Sex), 2021, TableBuilder **(d)** Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder **Notes:** Workforce Numbers are rounded to the nearest 100.

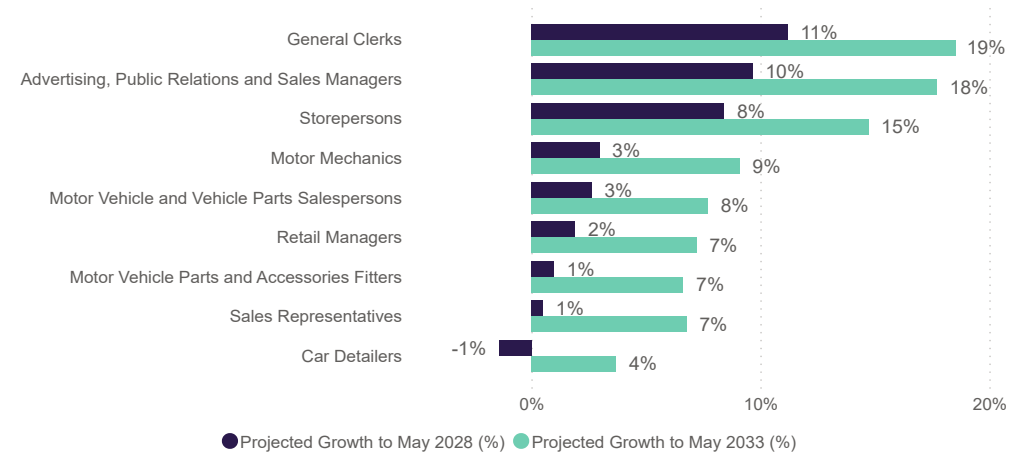
# Automotive retail and wholesale occupation insights

Figure 51: Automotive retail and wholesale occupation insights

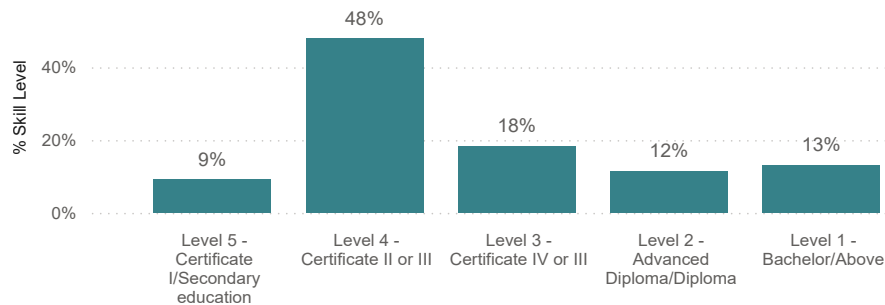
(e) Top 10 ANZSCO Occupations by Workforce Numbers



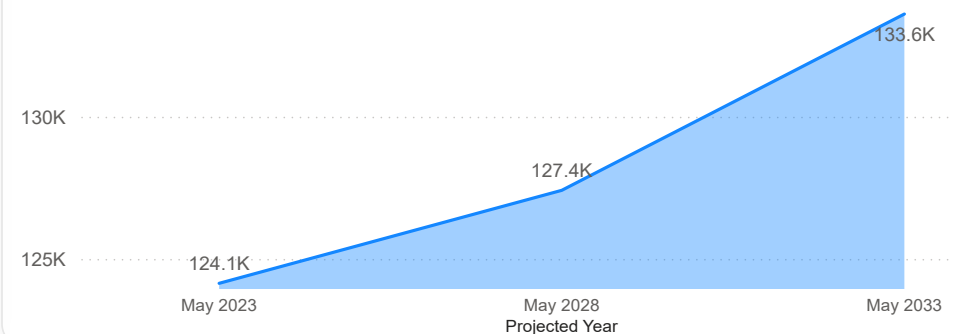
(f) Employment Projections by ANZSCO Occupations



(g) Automotive Retailing and Wholesaling Workforce Occupation Skill Level Commensurate with



(h) Employment Projections of Motor Vehicle Retailing and Wholesaling

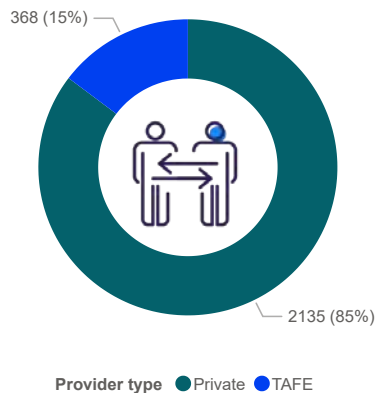


Sources: (e) ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL(ANZSCO 2013) (f) Employment Projections produced by VU for JSA (May 2023 to May 2033) (g) ABS Table Builder 2021 Census - employment, income and education (OCSKP Occupation Skill Level by INDP Industry of Employment) (h) Employment Projections produced by VU for JSA (May 2023 to May 2033)

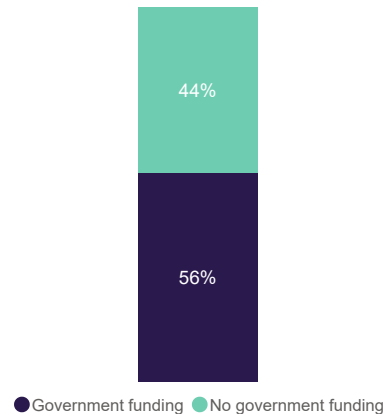
# Automotive retail and wholesale AUR retail training package insights

Figure 52: Automotive retail and wholesale AUR retail training package insights

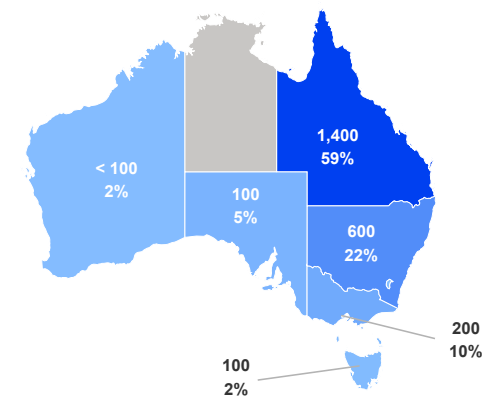
(i) Enrolments by Type of Training Providers



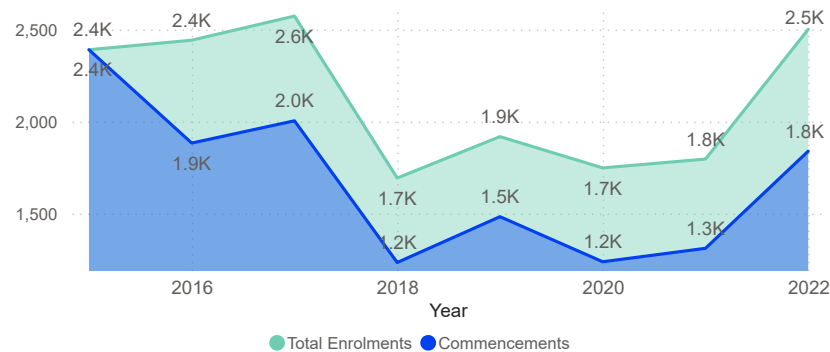
(j) Enrolments by Funding Sources



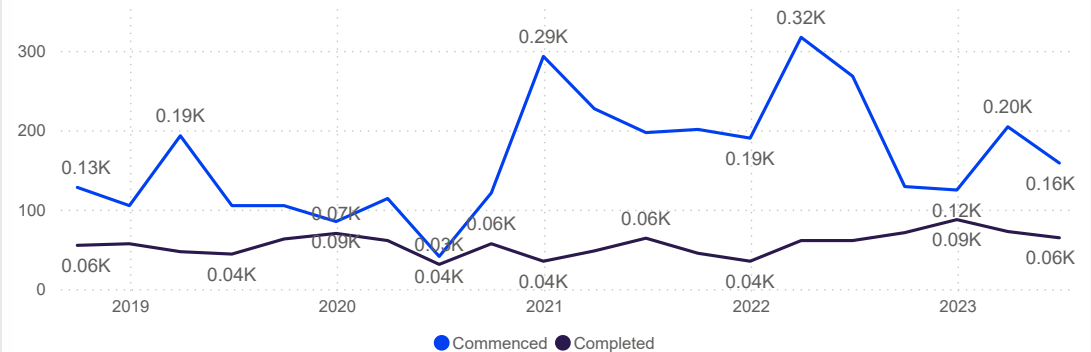
(k) Training Program Delivery Location



(l) AUR retail Annual Enrolments and Commencements



(m) AUR Retail Apprentices and Trainees Commencements and Completion by Quarter



Sources: (i) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (j) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (k) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (l) NCVER. 2023. TVA program enrolments 2015-2022 (VOCSTATS). Adelaide, December (m) NCVER. 2023. Apprentices and trainees, Sep 2018 - Jun 2023 (VOCSTATS). Adelaide **Note:** 1. Figure (m) Apprentices and Trainees commencements and completions are rounded to nearest 5. 2. Figure (k) are rounded to nearest 100.

## Automotive retail and wholesale demographics

The automotive retail and wholesale sector's workforce of 121,600 (four-quarter average, May 2023 to February 2024) has remained relatively steady over the last 5 years, despite year-on-year growth in new vehicle sales. While the workforce receded marginally throughout the COVID pandemic, it has returned to its longer-term average size. The ability of a workforce that is not growing to be able to cater to growing sales volumes likely speaks to the changing nature of how consumers research and increasingly purchase their vehicles.

The increased access consumers have to rich and engaging online content, including the proliferation of detailed vehicle reviews on sites such as YouTube, has taken the activity of researching potential purchases increasingly off the car yard and into the lounge room. Feedback from the industry has confirmed an increasing number of consumers are ordering their vehicles online or they visit dealerships purely to test drive, spec-up and order their vehicles.

*the prevalence of non-trade roles within this sector is seen as the key reason for the higher female workforce demographics*

The overall increase in activity within the sector is projected to see the workforce grow over the coming nine years to approximately 133,600 workers.<sup>252</sup>

The automotive retail and wholesale sector is dominated by occupations such as salespersons, retail managers, car detailers and store persons. Of note, the ABS includes a count of 14,000 motor mechanics within its ANZSIC statistics for this sector, likely due to these staff working for service departments embedded within dealerships. These 14,000 mechanics and their associated skills, needs and challenges will be considered as part of this report's [Automotive Repair and Maintenance](#) section.

Excluding motor mechanics, only one of this sector's top occupations is identified by the 2023 Skills Priority List as experiencing a skills shortage, being for advertising, public relations and sales managers, suggesting this sector of the automotive industry is experiencing less difficulty in meeting its required workforce needs.<sup>253</sup>

Not unlike the actual physical location of dealerships and retailers, the sector's workforce is broadly distributed across Australia in line with population density.

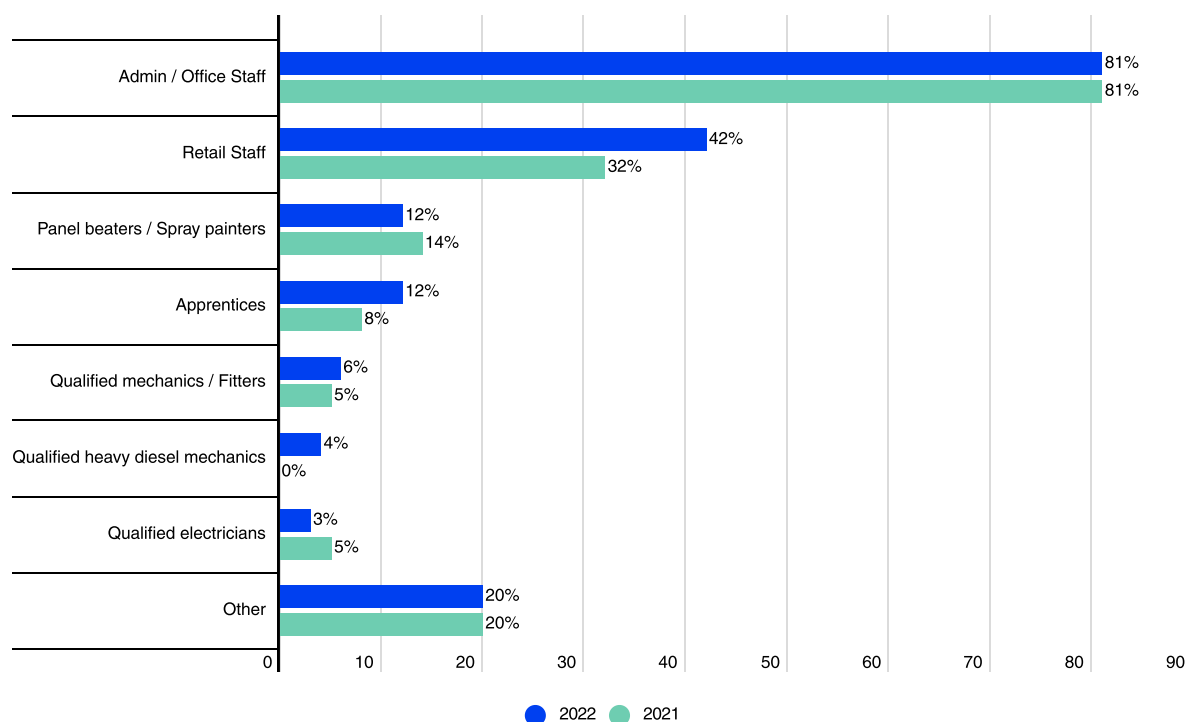
The automotive retail and wholesale sector has the largest proportion of female workers within the automotive industry, accounting for 25% of the workforce. The prevalence of non-trade roles within this sector is seen as the key reason for the higher female workforce demographics, a position which is corroborated by industry research conducted by the Capricorn Society which identified the key areas within the automotive industry employing women.<sup>254</sup>

252 Jobs and Skills Australia. *'Employment Projections'*. 2023

253 Jobs and Skills Australia. *'Skills Priority List'*. 2023

254 Capricorn Society. *State of the Nation 2022*. 2022

**Figure 53: Automotive businesses with female participation**



Source: Capricorn Society. State of the Nation 2022. 2022

The automotive retail and wholesale sector counts 16.45% of its workforce as being aged below 26, five percentage points higher than the proportion of the workforce aged above 60 (11.41%) and approaching retirement. This generally bodes well for the sector in relation to backfilling upcoming retirements with new entrants.

Most of the top occupations within this sector, excluding motor mechanics, are identified within the ANZSCO occupation classifications system as being Skill Level 4 or 5 roles that largely equate to qualifications at the Cert II level and below. Such roles have lower educational barriers to entry.<sup>255</sup> As a result, almost half of the workforce has secured work in the sector with only secondary equivalent education attainment. Certificate III and IV qualifications make up the next largest proportion of the workforce at approximately 32%, with the remainder comprising those with diploma level and above qualifications.

Enrolments within VET qualifications relevant to this sector are heavily concentrated on the AUR31020 Certificate III in Automotive Sales, and its superseded version AUR31016 of the same name (2,235 enrolments, 54% of which are by way of a traineeship). Most VET enrolments (59.11%) occurred in Queensland, where it is a requirement to complete numerous units from these qualifications as part of the motor salesperson registration process.<sup>256</sup>

<sup>255</sup> Australian Bureau of Statistics. *ANZSCO - Australian and New Zealand Standard Classification of Occupations – Structure. 2022.*

<sup>256</sup> Queensland Government. *Register as a motor salesperson. 2021.*

## Automotive retail and wholesale workforce drivers

While not affected by skills shortages, the automotive retail and wholesale sector is experiencing a gradual but persistent change to both consumer behaviour and the method by which automotive manufacturers are bringing their products to market.

As has already been discussed, consumers' access to detailed and informative online reviews, especially in video format on platforms such as YouTube, has seen a shift away from salespersons being the primary source of information on vehicle types and models.

The functionality offered by vehicle manufacturers' websites has also evolved significantly, with online car configurators and the ability to price up potential purchases, including specifically chosen options, now standard. Undoubtedly, the ability to furnish highly interactive online experiences and maintain close relationships with online reviewers and influencers has increased the important role of advertising and marketing professionals within the industry.

The ability to complete an order for a new vehicle online is also becoming more commonplace, especially among electric vehicle brands such as Tesla and BYD, who have gone one step further and replaced dealerships with company-owned stores.<sup>257</sup>

These advances for consumers have, in some instances, reduced the role of a vehicle salesperson to order fulfilment.

Feedback from dealers, especially those involved in the sale of popular SUVs, 4WDs and light commercial vehicles, suggests consumers are increasingly looking to dealerships for assistance in modifying their vehicles as part of the sales process. Modifications such as suspension upgrades, bull bars, changes to wheels and tyres, canopies and driving lights have seen salespeople become important sources of insights and guidance once again.

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<sup>257</sup> Naughton, Nora. *Electric cars are killing the car dealership as we know it*. Business Insider. 2024





## Automotive manufacturing overview

Although Australia’s automotive manufacturing sector is no longer home to large-scale passenger vehicle manufacturing (having ceased in 2017), it generated over \$14 billion in revenue from over 3,000 businesses in 2022–23.<sup>258 259 260 261</sup>

The sector’s greatest economic output is derived from the manufacture of caravans and camper trailers, accounting for \$3 billion in revenue in 2022–23 (21.1% of this sector’s output). The manufacture of trucks (16.1% of sector output), motor vehicle bodies (12.6%) and buses (10.5%) round out the top performers.

In 2021, the industry developed 23,931 RVs (towable and motorised).<sup>262</sup> By January 2023, there were 765,150 registered caravans on Australian roads, up from 726,584 in 2022 and 687,172 in 2021.<sup>263</sup>

**Table 3: Automotive Manufacturing Sector Revenues 2022–23**

Manufactured Products (2022/23)	Revenue (\$ millions)	%
Caravans and Camper Trailers	3,000	21.1%
Trucks	2,300	16.1%
Motor Vehicle Bodies	1,800	12.6%
Buses	1,500	10.5%
Powertrain Parts	1,500	10.5%
Chassis Parts	1,200	8.4%
Other Motor Vehicle Manufacturing	719	5.0%
Campervans and Motorhomes	504	3.5%
Other Parts	427	3.0%
Accessories	412	2.9%
Body Exterior Parts	346	2.4%
Motor Vehicle Trailers	308	2.2%
Interior and Safety Parts	227	1.6%
<b>TOTAL</b>	<b>14,243</b>	<b>100%</b>

Source: AUSMASA calculated values from IBISWorld Industry Reports

258 IBISWorld. *Automotive Industry in Australia. 2023*

259 L. Duane-Davis. *Motor Vehicle Manufacturing in Australia. 2023*. IBISWorld.

260 J. Fahey. *Motor Vehicle Body and Trailer Manufacturing in Australia. 2023*. IBISWorld.

261 DK Jeswanth. *Motor Vehicle Parts and Accessories Manufacturing in Australia. 2023*. IBISWorld.

262 Caravan Industry Association of Australia. *Who We Are*. Accessed April 2024

263 Bureau of Infrastructure and Transport Research Economics. *Road Vehicles, Australia January 2023. 2023*

# Automotive manufacturing demographics insights

Figure 54: Automotive manufacturing demographics insights

40,000

Workforce Numbers  
4 quarter average

22%

Female %

42

Median Age

12%

Age 25 or Younger

11%

Age 60 +

43%

VET Qualified

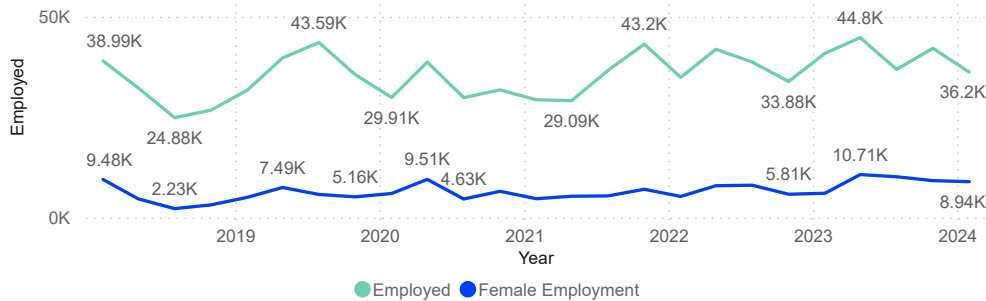
21%

Bachelor or Above

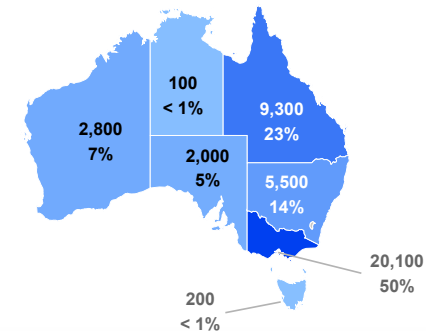
1%

First Nations

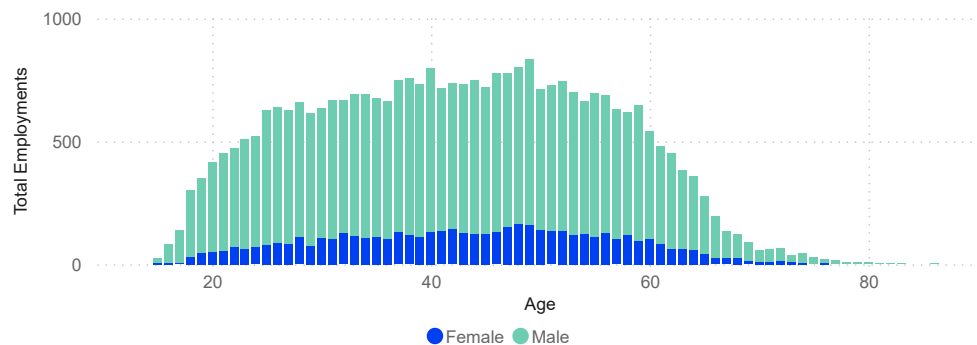
(a) Total Workforce Numbers 2018 - 2024 by Quarter



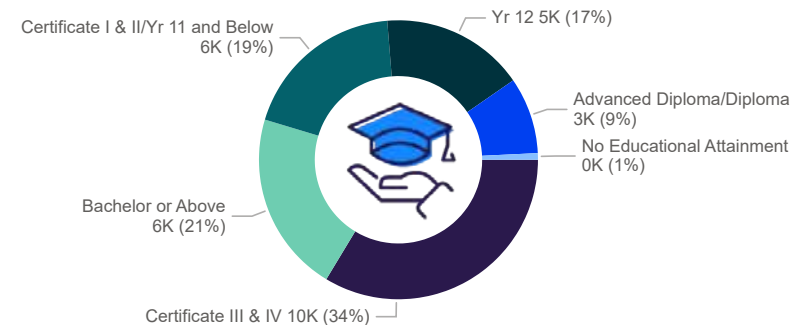
(b) Total Workforce by State/Territory, 4 quarter average



(c) Age Distribution of the Workforce



(d) Education Level of the Workforce

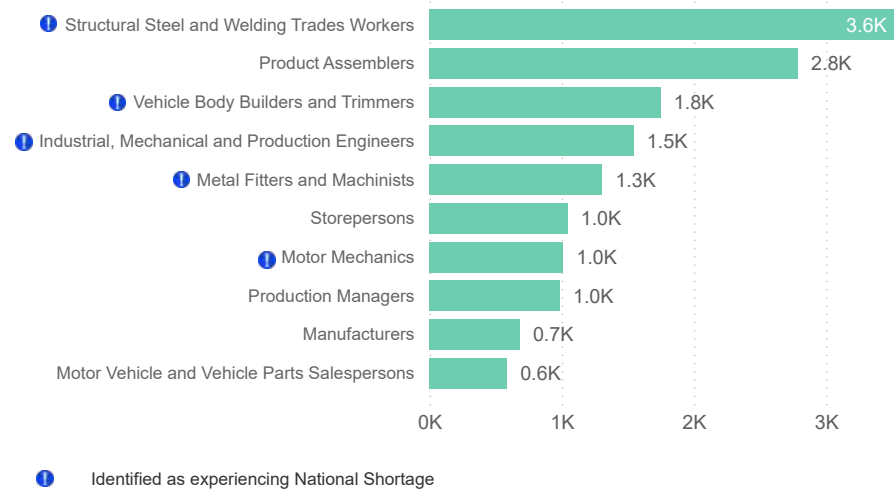


Sources: (top row) Workforce Numbers and Female %: ABS Detailed Labour Force Survey (Table EQ06, Four-Quarter Average), May 2023 - February 2024 | Median Age, Age 25 or Younger, Age 60+, VET Qualified, Bachelor or Above and First Nations: ABS Table Builder 2021 Census - counting persons, 15 years and over by 3-digit level INDP Industry of Employment **Notes:** Workforce Numbers are rounded to the nearest 100. (a) ABS Detailed Labour Force Survey (Table EQ06, Original), Reference Period: February 2024 (b) ABS Detailed Labour Force Survey (Table EQ06, 4-quarter Average), Reference Period: February 2024 (c) Census of Population and Housing (AGEP Age and SEXP Sex), 2021, TableBuilder (d) Census of Population and Housing (HEAP Level of Highest Educational Attainment), 2021, TableBuilder

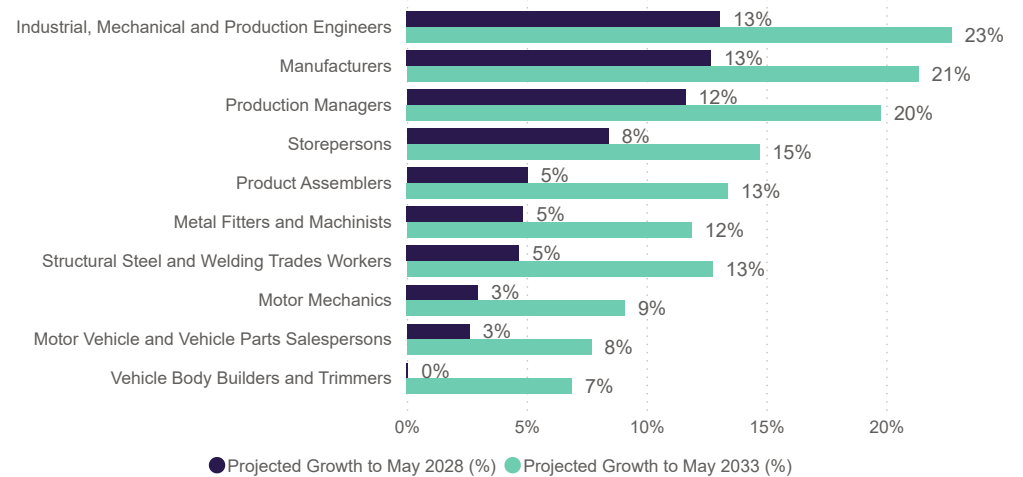
# Automotive manufacturing occupation insights

Figure 55: Automotive manufacturing occupation insights

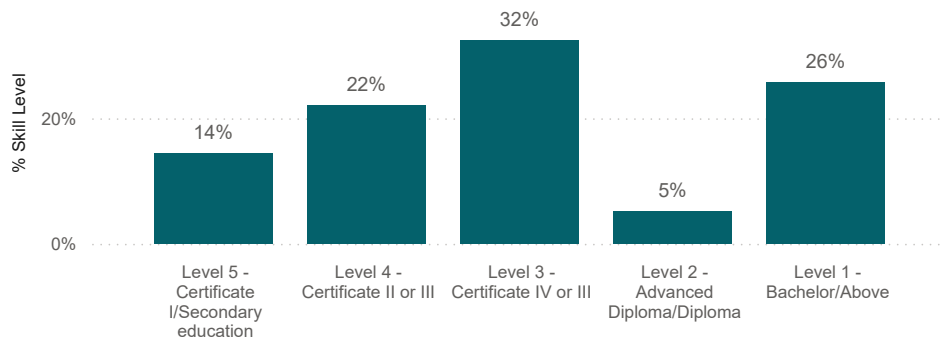
(e) Top 10 ANZSCO Occupations by Workforce Numbers



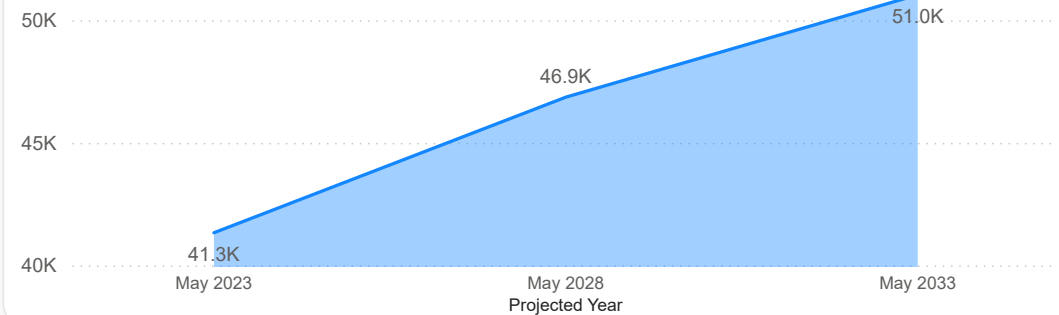
(f) Employment Projections by ANZSCO Occupations



(g) Automotive Manufacturing Workforce Occupation Skill Level Commensurate with



(h) Employment Projections of Motor Vehicle Manufacturing



Source: (e) ABS Table Builder 2021 Census - INDP Industry of Employment, OCCP Occupation | JSA Skills Priority List 2023. 4-dig SPL(ANZSCO 2013) (f) Employment Projections produced by VU for JSA (May 2023 to May 2033) (g) ABS Table Builder 2021 Census - employment, income and education (OCSKP Occupation Skill Level by INDP Industry of Employment) (h) Employment Projections produced by VU for JSA (May 2023 to May 2033)

# Automotive manufacturing AUM training package insights

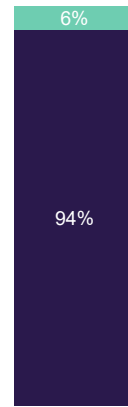
Figure 56: Automotive manufacturing AUM training package insights

(i) Enrolments by Type of Training Providers



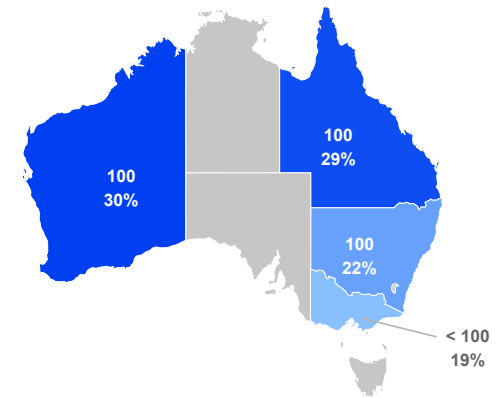
Provider type ● TAFE institutes

(j) Enrolments by Funding Sources

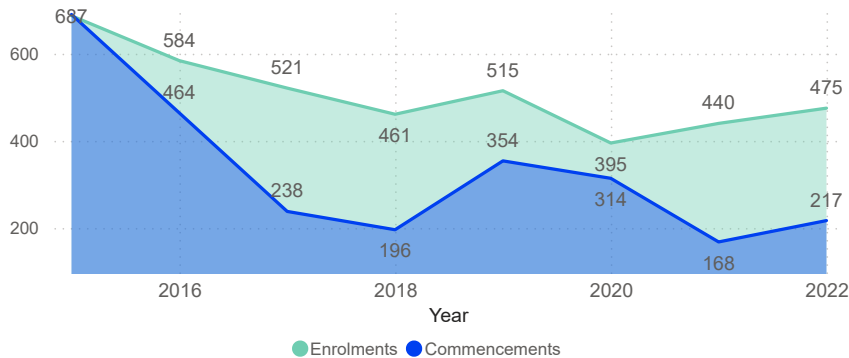


● Government funding ● No government funding

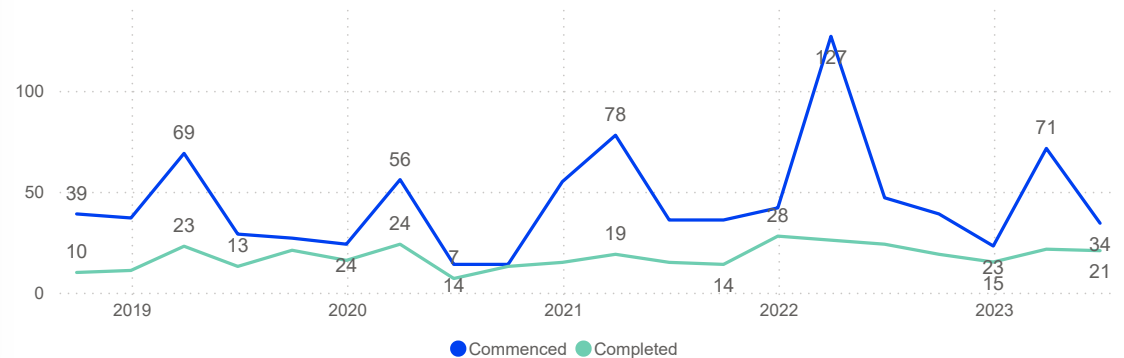
(k) Training Program Delivery Location



(l) AUM Annual Enrolments and Commencements



(m) AUM Apprentices and Trainees Commencements and Completion by Quarter



Sources: (i) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (j) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (k) NCVER. 2023. TVA program enrolments 2022 (VOCSTATS). Adelaide (l) NCVER. 2023. TVA program enrolments 2015-2022 (VOCSTATS). Adelaide, December (m) NCVER. 2023. Apprentices and trainees, Sep 2018 - Jun 2023 (VOCSTATS). Adelaide **Note:** 1. Figure (m) Apprentices and Trainees commencements and completions are rounded to nearest 5. 2. Figure (k) are rounded to nearest 100.

## Automotive manufacturing demographics

The automotive manufacturing sector's workforce has broadly remained steady at around 40,000 workers (four-quarter average, May 2023 to February 2024), [Figure 54](#). With increases in specialised local automotive manufacturing and in line with record vehicle, caravan and campervan sales, it is not surprising the JSA employment projections forecasts the industry to surpass 50,000 workers over the 10 years to May 2033.<sup>264</sup>

Half of the **top 10** occupations for this sector are identified by the 2023 Skills Priority List as **experiencing a shortage**, including **4** out of the top **5** occupations

Key occupations for the sector include structural steel and welding trades, product assemblers, vehicle body builders and trimmers and industrial, mechanical and production engineers. Half of the top 10 occupations for this sector are identified by the 2023 Skills Priority List as experiencing a shortage, including 4 out of the top 5 occupations.<sup>265</sup>

Strong growth in these occupations is expected over the coming years, especially for industrial, mechanical and production engineers, which the JSA Employment Projections model suggests the industry will need over 8,900 more of over the 10 years to May 2033.<sup>266</sup>

The sector's workforce is centred in Victoria (45% of the total workforce), followed by Queensland (26%), New South Wales (13%), Western Australia (8%) and South Australia (6.5%). The Northern Territory and Tasmania each have less than half a per cent of the workforce population.

Although this sector relies heavily on trade occupations, it performs much better than the automotive repair and maintenance sector in relation to female representation within the workforce, recording 21.5%.

The workforce, with a median age of 42, is the oldest of all the automotive industry sectors, with 12.45% of its workforce under the age of 26, offset by 10.9% aged over 60.

<sup>264</sup> Jobs and Skills Australia. *'Employment Projections'*. 2023

<sup>265</sup> Jobs and Skills Australia. *'Skills Priority List'*. 2023

<sup>266</sup> Jobs and Skills Australia. *'Employment Projections'*. 2023





This sector relies strongly on both the VET system and higher education, a testament to the mixed nature of skills required in manufacturing. Almost 43% of the workforce are VET qualified, and 21% hold a higher education qualification, which is the highest workforce percentage within the automotive industry.

*21% hold a higher education qualification, which is the highest workforce percentage within the automotive industry*

Data from NCVET shows the AUM30218 Certificate III in Automotive Manufacturing Technical Operations – Bus, Truck and Trailer accounts for almost all the active enrolments within the AUM training package, see [Appendix I](#). In 2022, the package recorded 475 actively enrolled students, of which 217 commenced that year.

As outlined above, it is worth noting that it is currently only offered by public TAFEs in Western Australia (30% of enrolments), Queensland (29%), New South Wales (22%) and Victoria (19%)<sup>267</sup> This represents a challenge for industry expansion in other jurisdictions.

## Automotive manufacturing workforce drivers

The Australian automotive manufacturing workforce has had to reinvent itself following the departure of large-scale passenger vehicle manufacturing. It has emerged as a small but growing, highly skilled multi-disciplinary workforce involved in a range of vehicle, vehicle body, and parts manufacturing.

In addition to meeting the demands of an outdoor-loving nation in the form of caravans, RVs and trailers, other innovative businesses have also emerged.

Firms such as Walkinshaw Engineering and Premcar have developed successful business models on the back of in-demand Australian automotive engineers. In the case of Walkinshaw, this has seen a boom in left to right-hand drive conversions for big American 'utes' such as the Dodge Ram, and more recently for the Toyota Tundra.<sup>268</sup>

Australia's ongoing adoption of EV technology is also creating new automotive manufacturing opportunities for the industry, with several businesses beginning to specialise in EV conversions.

<sup>267</sup> Training.gov.au. *AUM30218 - RTOs With Scope to Deliver*. Accessed March 2024

<sup>268</sup> Stephen Corby. *The revival of Australia's manufacturing industry is focused on building the future*. The Australian. 2023.

Australian firm Zero Automotive is preparing to roll out 200 EV-converted Toyota LandCruisers to underground mines commencing in 2024,<sup>269</sup> with fellow Australian firm SEA Electric having even bolder plans to convert 8,500 Toyota HiLux and LandCruiser utes, also in support of the mining industry.<sup>270</sup> In this instance, demand factors from the mining industry are helping to drive new manufacturing opportunities in the automotive industry.

On a larger scale, the automotive manufacturing industry is well poised to support the local manufacture of EV components, including batteries, provided the full or partial intent of Australia's Critical Mineral Strategy is fulfilled.<sup>271</sup> This would represent a significant demand driver for an increase in the skills already present within the automotive manufacturing industry and likely require new and advanced skills linked to emerging technologies.

### AREA OF FOCUS

AUSMASA will continue to work closely with industry to explore what additional skills may be required to fully realise the opportunities of EV components.

269 Jordan Mulach. *Electric Toyota Landcruiser 70 Series Ute Revealed for Australia – But Not Showrooms*. Drive.com. 2023.

270 Jordan Mulach. *Australian Company to Build 8500 Electric Toyota Hilux, Landcruiser Utes for Mining Sites*. Drive.com. 2023.

271 Mard Dean. *Rebuilding Automotive Manufacturing in Australia: Industrial Opportunities in an Electrified Future*. 2022.





**Mining and  
Automotive**  
Skills Alliance

The Mining and Automotive Skills Alliance (AUSMASA)  
is a Jobs and Skills Council funded by the  
Australian Government Department of Employment and Workplace Relations.

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# Appendix

## Key stakeholders and engagement strategies

### Appendix A

AUSMASA recognises the important contribution industry, peak bodies, unions, STAs, government departments (both state and federal), the education sector and other JSCs make in the successful execution of AUSMASA's workforce planning, industry stewardship, training product development and implementation, promotion, and monitoring functions.

[Appendix E](#) lists the key stakeholders currently being engaged with by AUSMASA, noting this list is constantly expanding and evolving. [Appendix E](#) identifies key stakeholders by industry (mining and automotive), by government department and education provider type (public and private).

Within the mining and automotive industry stakeholder lists, further classification is made for employers, unions, OEMs, industry associations, and peak bodies.

Employers and unions are critical for receiving granular feedback on industry movements, challenges and opportunities at specific sites and among particular job roles. On the other hand, industry and peak bodies can provide valuable industry-wide insights on trends, challenges, and opportunities and are often able to leverage their large membership base to gain in-depth survey data.

OEMs provide up-to-date intelligence on the technologies that will shape the future workforce of the mining and automotive industries and are often keenly involved in training initiatives for such new features.

STAs and government departments are key sources of policy priorities, including funding training, investment in TAFE infrastructure, strategies impacting work health and safety, and localised workforce transformation challenges.

Public and private education providers are critical for ensuring the delivery considerations of training products are understood, with providers also offering industry insights from a training and education perspective.

AUSMASA acknowledges the vital importance of its partnership with DEWR, JSA, and the NCI as key contributors to the success of the JSC model. Close working relationships with DEWR, JSA, and the NCI are upheld at the executive leadership level.

It should be noted AUSMASA is applying a diverse range of strategies to ensure key stakeholders are consulted, and projects are driven by industry needs, considering the needs and perspectives of individual states and territories.

# Existing engagement activities

## Appendix B

AUSMASA has implemented a range of strategies to engage with and be informed by key stakeholders. These activities are identified below.

### Direct stakeholder engagement

AUSMASA is keenly interested in connecting widely with the mining and automotive industries, and while several formal engagement mechanisms are detailed below, the Industry Engagement team within AUSMASA stands ready and willing to engage with stakeholders at any time.

The AUSMASA team regularly attends and supports key industry events, conventions, and conferences around Australia to connect with a wide array of stakeholders. The Industry Engagement team is prepared to connect as required with interested stakeholders to discuss concerns and insights or explore opportunities for the mining and automotive industries. Such meetings can occur in person or online.

AUSMASA has staff based in Western Australia, Queensland, and Victoria and regularly visits other states and territories in both metropolitan and regional locations.

AUSMASA aims to respond to industry enquiries within 2 business days.

### Strategic Workforce Advisory Panels (SWAP)

AUSMASA's Strategic Workforce Advisory Panels represent a key tripartite engagement strategy. In this strategy, key industry insights and trends are shared with AUSMASA, and recommended projects are considered for endorsement.

Each panel consists of 15 members, including employers, unions, education provider peak bodies (both TAFE and private RTOs), industry associations, and OEMs. The selection of each panel's members was completed in September 2023, and each panel meets 4 times per year.

The composition of each SWAP panel was guided by a range of strategic objectives, including the desire to aim for gender balance, broad geographic representation, a diversity of organisation types and the appointment of members with detailed industry insights.

The membership composition of both SWAPs is available in [Appendix D](#) of this plan.

### Technical Advisory Groups (TAGs)

Technical Advisory Groups (TAGs) are established in support of specific projects and are designed to provide subject matter expert advice and guidance throughout the training product development process.

The number of TAGs constituted at any given time will depend on the quantum of projects underway with AUSMASA. TAGs consist of 12–15 members, with meetings generally occurring monthly for the duration of the project.

As per the guiding principles of SWAPs, TAG members will comprise employers, unions, relevant industry groups and associations as well as education providers.

## **Industry and education provider roundtables**

AUSMASA aims to hear from industry all throughout Australia, noting different regions, rural and remote communities, and certain locations have unique opportunities and challenges that need to be understood.

In addition to the engagement strategies already identified, AUSMASA conducts a range of industry and education provider roundtables, forums, and workshops throughout Australia. These roundtables are open to any interested stakeholder and are offered free of charge.

Roundtables allow participants to hear directly from AUSMASA about the status of current and planned projects. The roundtables feature a facilitated session whereby participants can directly share their insights into candidate attraction and retention issues and opportunities, how well the VET system and current qualifications are serving their needs, and any emerging trends the industry feels will have an impact in the near future.

The insights gained by these roundtables feed directly into AUSMASA's stakeholder insights ecosystem and are used to inform future bodies of work to assist the industry.

Roundtables are run separately for each industry.

## **State Training Authorities and government departments**

AUSMASA values the importance of maintaining collaborative engagement with all relevant STAs and applicable government departments, both state and federal.

Members of AUSMASA's executive leadership team organise engagements with STAs and government departments through regular communication and meetings.

# Planned engagement activities

## Appendix C

Additional engagement activities are planned to be introduced soon to further enhance AUSMASA's ability to gain valuable industry insights.

### Skills Forum 2024

Building on the success of 2023's CMEV, [Critical Minerals Electric Vehicle Skills Forum \(page 20\)](#), AUSMASA will host a Skills Forum in the second half of 2024.

This forum will bring together key stakeholders from across the automotive and mining industries, including employers, unions, OEMs, education providers and government, for a facilitated deep dive into the skills, challenges, and opportunities facing both industries.

As was the case with CMEV, AUSMASA will employ the Rapid Consensus Building approach to the day's activities to derive meaningful plans and next steps for both industries. **Details for the Skills Forum are being finalised.**

### The AUSMASA Pulse of the Industry Survey

A new engagement strategy AUSMASA will discuss with key stakeholders is the concept of a broad-ranging survey to gain insights into attraction and retention, emerging trends and satisfaction with specific qualifications and programs.

Noting AUSMASA's stakeholders, especially key industry bodies, have access to large databases of industry participants, it is envisaged that any such survey would be conducted in partnership with these organisations.

Discussions around how such a survey would work are planned to commence in June 2024 with the first survey proposed for October–November, in time to add insights into the next annual workforce plan.

### Briefing sessions for STAs and industry regulators

Following on from the dedicated introductory meetings held by AUSMASA with STAs in 2023, the Training Products and Implementation team have commenced regular briefings to keep STAs and industry regulators abreast of projects being undertaken by AUSMASA and seek specific feedback on state and territory priorities.

### Creation of a Thought Leadership Network

The mining and automotive industries are at the forefront of technological innovation and exciting new trends and opportunities. While many of AUSMASA's engagement strategies focus on understanding the industry's current and emerging needs, it is equally important to keep an eye on the future pipeline of technology, disruption, and opportunities.

AUSMASA will look to establish a Thought Leadership Network to bring together futurists and experts in the technologies that will shape the future of the mining and automotive industries and other key industry leaders. **The Thought Leadership Network is in its early stages of conceptual development.**

## Collaboration with other Jobs and Skills Councils

AUSMASA is privileged to work alongside 9 other dedicated JSCs, who all share the common aim of assisting the industries we represent to thrive.

Many of the challenges and opportunities faced by the mining and automotive industries are shared by others too. Innovative and impactful solutions often benefit from collaborative efforts.

The CEOs of all 10 JSCs meet at least quarterly to share lessons and challenges and identify opportunities for collaborative solutions. In addition to these quarterly CEO meetings, AUSMASA is proposing to discuss 2 additional JSC-wide collaboration opportunities with the other JSCs.

The first proposal will be to work on a large multi-industry career map, highlighting the career entry, progression, and mobility available in Australia's modern workforce. The ability to jointly explore inter-industry linkages, entry and exit points between industries and the shared skills required to make such journeys possible would offer deeper insights into common development opportunities within each JSC's respective training packages and serve as a visual tool for career exploration.

Secondly, AUSMASA proposes the joint hosting by all JSCs of a 'State of the Nation' forum, with a particular focus on technology and its impact on future workforces across multiple industries. The ability to get key stakeholders from multiple industries to collaborate and explore potential solutions to a changing workforce landscape could give rise to an ongoing signature event for the JSC network.

AUSMASA also recognises the mining and automotive industries are naturally closely aligned with other industries, such as oil and gas, transport and logistics, manufacturing, digital skills, and building and construction. It makes sense to seek out close working relationships with the JSCs supporting these industries.

This plan has already highlighted opportunities to work with Future Skills Organisation on improving digital literacy skills and Public Skills Australia on first responder training in relation to EV accidents.









Additionally, AUSMASA will work with BuildSkills Australia, who share elements of the RII training package. This will ensure any work on the package considers the needs of both the mining and civil construction industries.







Engagement with Industry Skills Australia, which represents the transport industry, will likely revolve around the shared exploration of the impact of hydrogen and driverless technologies on heavy transport and opportunities that arise as part of the broader critical mineral strategy as it relates to supply-chain implications from increased onshore refining and processing.










Finally, engaging with the Powering Skills Organisation, which represents energy, oil and gas, and renewables, will likely revolve around shared workforce challenges between mining and the oil and gas industry, noting numerous critical trade roles are shared across both industries.

# SWAP members

## Appendix D

Automotive SWAP Members	Name	Title	Organisation
	Bruce McIntosh	State Manager	Tasmanian Automotive Chamber of Commerce
	Deborah Joyce	Executive Officer	Automotive Training Board New South Wales
	Ian Price	RTO General Manager	Motor Traders' Association of New South Wales
	Jason Trewin	Chief Operating Officer	I-CAR Australia in Victoria
	Jodi Ryan	General Manager Apprenticeships	Motor Trade Association South Australia Northern Territory
	Jonathon Maile	Executive Director - Engineering, Transport and Defence	South Metropolitan TAFE in Western Australia
	Kate Evans	Training Manager and Apprentice Program Leader	Cummins Asia Pacific
	Lesley Yates	Director of Government Relations and Advocacy	Australian Automotive Aftermarket Association

Automotive SWAP Members	Name	Title	Organisation
	Mark Harper	Industry Consultant Automotive and Engineering	Utilities, Engineering, Electrical and Automotive Training Council
	Matthew Tosolini	National Registered Training Organisation (RTO) and Technical Capability Manager	Komatsu Australia
	Melissa Mangano	National Employee Relationship Manager	United Forklift and Access Solutions
	Paul Baxter	National Skills and Training Coordinator	Australian Manufacturing Workers Union
	Sarah Brunton	National Technical Officer	Electrical Trades Union of Australia
	Todd Hacking	Chief Executive Officer	Heavy Vehicle Industry Association

Mining SWAP Members	Name	Title	Organisation
	Ben Lewis	Managing Director	One Key Resources
	Elizabeth Gibson	General Manager	Construction Material Processors Association
	Jodie Badcock	Chief Executive Officer	Resources and Engineering Skills Alliance
	Karolina Szukalska	General Manager of Workforce and Innovation	Minerals Council of Australia
	Osama Ali	Regional Manager	Product Safety and Compliance, Caterpillar
	Robert Petherbridge	Executive Director of Commercial Business	TAFE Queensland
	Scott Layton	Leadership Projects	BHP
	Shane Roulstone	National Organising Director	Australian Workers Union
	Stephen Watts	Industry Safety and Health Representative	Queensland's Mining and Energy Union



Mining SWAP Members	Name	Title	Organisation
	Tim Westcott	Director and Vice President	Australian Drilling Industry Association
	Troy Cook	Strategic Workforce Advisor	Into Work/MAS National
	Vanessa Skipworth	General Manager	Tasmanian Minerals, Manufacturing and Energy Council
	Zane Hughes	Project Lead Researcher	Cooperative Research Centre for Transformations in Mining Economies

# Key Stakeholders

## Appendix E

### Mining Industry Stakeholders

Employers	Industry Associations / Peak Bodies
Arafura Rare Earths	Association of Mining and Exploration Companies (AMEC)
BHP	Austmine
BHP Mitsubishi Alliance	Australasian Institute of Mining and Metallurgy (AusIMM)
Evolution Mining	Australian Drilling Industry Association (ADIA)
Fortescue	Chamber of Minerals and Energy WA (CME)
Glencore	Coal Services NSW
Idoba	Construction and Mining Equipment Industry Group (CMEIG)
IntoWork	Construction Material Processors Association (CMPA)
Locating Unlimited	Minerals Council of Australia (MCA)
Minerals Resources	Resource and Engineering Skills Alliance (RESA)
One Key Resources	Resource Industry Training Council (RITC)
Programmed Skilled Workforce	Tasmanian Minerals, Manufacturing and Energy Council (TMEC)
Rio Tinto	Australian Resources & Energy Employer Association (AREEA)

## Mining Industry Stakeholders (cont.)

Original Equipment Manufacturers	Unions
Barmingo	Australian Workers Union (AWU)
Caterpillar	Mining and Energy Union (MEU)
Hastings Deering	
Hitachi	
Komatsu	
Liebherr	
Murray Engineering	
Normet	
Westrac	
William Adams	
Epiroc	
3ME Technology	

## Automotive Industry Stakeholders

Original Equipment Manufacturers/ Employers	Industry Associations / Peak Bodies
	Bicycle Industries Australia (BIA)
Carloop	Australian Automotive Aftermarket Association (AAAA)
CMV Truck & Bus	Australian Manufacture Workers Union (AMWU)
Cummins	Australian Refrigeration Council (ARC)
Eagers Automotive	Boating Industry Association (BIA)
Ford	Bus Industry Confederation (BIC)
Foton mobility	Capricorn Society
Isuzu	Electrical Trades Union (ETU)
Paccar	Federal Chamber of Automotive Industries (FCAI)
Pure Hydrogen	Future Battery Industries Cooperative Research Centre
Revora	Heavy Vehicle Industry Association (HVIA)
Revora	Manufacturing Skills Queensland
Scania	Motor Trade Association of SA/NT (MTA SA/NT)
Tesla	Motor Trades Association NSW (MTA NSW)
Toyota	Motor Trades Association of Australia (MTAA)
United Forklift and Access Solutions	Motor Trades Association of Queensland (MTAQ)
Velocity Trucks	Motor Trades Association of Western Australia (MTA WA)



Original Equipment Manufacturers/ Employers	Industry Associations / Peak Bodies
Volkswagen Group	Queensland Resources Council
Zero Automotive	Royal Automobile Club of Queensland (RACQ)
CMV Truck & Bus	Tasmanian Automotive Chamber of Commerce (TACC)
Zero Automotive	Truck Industry Council (TIC)
	Utilises Engineering Electrical Automotive Training Council (UEEA)
	Utilities, Engineering, Electrical, Automotive Training Council (UEEA)
	Victorian Automotive Chamber of Commerce (VACC)

## State Training Authorities & Government Departments

State Training Authorities	Government Departments
Automotive Training Board NSW	Department of Biodiversity, Conservation and Attractions (DBCA) (Australian Government)
NSW Department of Education, Skills & Pathways   Training Services NSW	Department of Education - Training Services NSW   Education and Skills Reform Division (NSW)
Office of the State Training Board WA	Department of Education (NT)
Victorian Skills Authority	Department of Energy, Environment and Climate Action (DELWP) (Australian Government)
Skills Canberra	Department of Energy, Environment and Climate Action (VIC)
Skills SA	Department of Industry, Tourism and Trade (NT)
Skills Tasmania	Department of Training and Workforce Development (DTWD) (WA)
South Australian Skills Commission	Department of Youth Justice, Employment, Small Business and Training (QLD)
	Department of Infrastructure, Planning and Logistics (NT)
	Electrical Safety QLD
	Industry Skills Advisory Council NT (ISACNT) (NT)
	Office of Industrial Relations (QLD)

## Education Providers

Public Education Providers	Private Education Providers
Box Hill Institute	Aveling
Canberra Institute of Technology (CIT)	I-CAR
Central Queensland University (CQU)	Independent Tertiary Education Council of Australia (ITECA)
Central Regional TAFE (WA)	Komatsu
Charles Darwin University	Monarch
Griffith University	MTA Institute
Bendigo Kangan TAFE	MTA NSW
North Metropolitan TAFE (WA)	MTA SA/NT
North Regional TAFE (WA)	MTA WA
South Metropolitan TAFE (WA)	MTAQ
South Regional TAFE (WA)	Trainwest
Central Regional TAFE	Volkswagen Group Australia
Sydney University	Westrac
TAFE Directors Australia (TDA)	WorkSafe Connect
TAFE NSW	
TAFE QLD	
TAFE SA	
TasTAFE	

## Summary of identified areas of focus

### Appendix F

## Mining industry

### Higher education and pathway opportunities

#### **M1. AREA OF FOCUS**

Reversing the trend of declining enrolments in engineering (especially mining-related) and Earth Sciences degrees is key. Initiatives such as Degree Apprenticeships may assist the higher education sector, and industry, to attract, support and retain students into such specialised fields. Industry would be well placed to work closely with the higher education sector in exploring how Degree Apprenticeships could be adopted.

#### **M2. AREA OF FOCUS**

AUSMASA will investigate initiatives such as higher apprenticeships. This work, coupled with ongoing work to identify the skills needs and career progression pathways for critical roles within the mining and automotive industries, will aim to offer innovative solutions for industry.

#### **M3. AREA OF FOCUS**

AUSMASA will monitor the changes to trainer qualification requirements in addressing trainer shortages and accessibility of vocational education and training, while also working closely with other JSCs to explore broader strategies required to encourage more people to consider engaging with the VET sector as a trainer and assessor.





#### **M4. AREA OF FOCUS**

AUSMASA will conduct further research into both the unequal geographical distribution and the longer-term decline of RII qualification enrolments within the metal ore mining sector.

### **Community perceptions of the mining industry**

#### **M5. AREA OF FOCUS**

AUSMASA will continue to work closely with industry and the National Careers Institute (NCI) to explore ways of better promoting the full breadth of career opportunities within the mining industry.

### **Diversified workforce**

#### **M6. AREA OF FOCUS**

The industry should continue to encourage and support female employment opportunities across all occupations within the mining industry, with the aim of addressing the existing gender pay gap and ensuring comprehensive workforce diversification.

### **Digitisation and automation**

#### **M7. AREA OF FOCUS**

AUSMASA, in partnership with industry and employee representatives, will ensure digitisation and automation training programs and support mechanisms are in place to harness each worker's existing skills and impart new skills.



## Technological advancement

### **M8. AREA OF FOCUS**

Given digital skills and digital literacy is a core aspect of technological advancement, AUSMASA will continue to work closely and collaboratively with the JSC responsible for digital skills – the Future Skills Organisation – while conducting its own work around skills mapping.

## Mine closure and post-mine land use

### **M9. AREA OF FOCUS**

AUSMASA will continue to work closely with industry and CRC TiME to define what VET programs could be developed to support this important workforce need.

## Cultural reform

### **M10. AREA OF FOCUS**

AUSMASA proposes to collaborate with other JSCs to develop an accredited training program, with supporting resources, for developing safe and respectful workplaces. This program would be made available across multiple training packages.

## Mental Wellbeing

### **M11. AREA OF FOCUS**

Research is required to quantify the effects of mental health issues on productivity and compensation claims within the mining industry.



### **M12. AREA OF FOCUS**

AUSMASA proposes to collaborate with other JSCs, especially HumanAbility, to investigate the appropriateness of current mental health training programs and packages for remote workers such as those in the mining industry.

## **First Nations employment and engagement**

### **M13. AREA OF FOCUS**

AUSMASA will continue to monitor First Nations training, apprenticeships, and job outcomes to identify best practices and assist in addressing the challenges faced by First Nations individuals in securing and thriving in mining careers. By analysing these outcomes, the industry will have the data it needs to implement targeted strategies and improve support.

## **Coal Industry – Workforce transformation**

### **M14. AREA OF FOCUS**

While capturing the transition to electrification using ANZSCO presents some difficulties, AUSMASA welcomes the release of JSA's Clean Energy Capacity Study and looks forward to providing key insights into this workforce transformation challenge.

### **M15. AREA OF FOCUS**

The VET sector must be ready and responsive to the future transformation of the coal industry workforce. AUSMASA will work closely with the industry to ensure innovative and engaging training programs are available.

## Critical minerals

### **M16. AREA OF FOCUS**

Given the significant implications critical minerals will have on Australia's mining and economic future, AUSMASA proposes that the ABS consider creating a new ANZSIC code. This initiative will facilitate and allow accurate workforce planning data to be produced quarterly through the ABS's Labour Force survey.

### **M17. AREA OF FOCUS**

A key priority for AUSMASA will be to work closely with industry and relevant government bodies in identifying any skills gaps within the current workforce and emerging skills required to assist in making these critical mineral strategies a reality. A particular focus will be on determining if current processing-related qualifications will be fit for purpose in relation to onshore refining and processing of critical minerals.

## Automotive industry

### Diversifying the workforce

### **A1. AREA OF FOCUS**

While the automotive industry has several programs designed to attract and support a more diverse workforce, it must continue to prioritise this and lead from the top down. A diversified workforce will help further improve the industry's perception and consequently attract new entrants into automotive careers.

## Skilled migration

### **A2. AREA OF FOCUS**

Industry feedback will be important regarding the challenges faced trying to fill vacancies and the importance skilled migration plays in meeting skills demand.

#### **AREA OF FOCUS**

More information is necessary to improve the skilled migration system's efficiency and responsiveness to the automotive industry skills shortages.

## Workforce attraction and retention

### **A3. AREA OF FOCUS**

The ABS should consider adjusting its terminology within ANZSCO to replace the word 'mechanic' with 'technician'.

## Mentorship of apprentices

### **A4. AREA OF FOCUS**

Consideration by government in relation to how industry can be better supported in the critical role of apprenticeship mentoring and support is seen as critical to improving retention and graduation rates. AUSMASA will continue to work with industry to advocate for government support that is targeted, and outcomes based.

### **A5. AREA OF FOCUS**

AUSMASA will work closely with industry to explore how automotive pathway programs can be better designed to address LLND barriers in addition to introducing industry skills and tasks.

## International students

### **A6. AREA OF FOCUS**

AUSMASA will investigate the possibility of embedding specific requirements for mandated workplace hours in key AUR qualifications to ensure students undertaking them outside of an apprenticeship pathway are provided the opportunity to apply their learnings and gain actual industry skills.

## Electric and hydrogen vehicles

### **A7. AREA OF FOCUS**

AUSMASA will collaborate with the industry to determine how the AUR training package can best support the introduction of ICE and EVs in an evolving repair and maintenance environment.

### **A8. AREA OF FOCUS**

AUSMASA will work with the ABS through its review of ANZSCO to advocate for the addition of EV Technician to the occupation list.

### **A9. AREA OF FOCUS**

Given the automotive industry's safety needs and their intersection with accident repair, AUSMASA will collaborate with PSA to investigate the development of an accredited training program for EV safety and emergency response.

### **A10. AREA OF FOCUS**

AUSMASA will work closely with industry to explore what unique skills are required for the dismantling and recycling of EV vehicles in an end-of-life setting.



### **A11. AREA OF FOCUS**

There are currently no nationally accredited training programs for the service, repair and safe handling of hydrogen as it relates to vehicles within the VET system. Accordingly, AUSMASA is progressing a project proposal for the development of accredited training elements.

## **Advanced technologies**

### **A12. AREA OF FOCUS**

AUSMASA will continue to work with industry to determine what changes to other qualifications or licensing may be required to empower automotive workers to perform some or all ADAS recalibration tasks.

### **A13. AREA OF FOCUS**

A key priority for AUSMASA will be to work with stakeholders in identifying the digital skills needs of the industry through use of the Australian Digital Capability Framework.

## **Automotive manufacturing**

### **A14. AREA OF FOCUS**

AUSMASA will continue to work closely with industry to explore what additional skills may be required to fully realise the opportunities of EV components.

## Update on 2023 Identified Opportunities

### Appendix G

The following opportunities were identified in AUSMASA's 2023 Initial Workforce Plan 'The Future is Now'. An update on each opportunity is provided below.

#### Opportunity 1

Given the significant changes happening within the automotive industry with the ongoing growth of battery EVs (light, heavy and mobile plant), the emergence of hydrogen and feedback on the suitability of vocational preparation qualifications in sufficiently promoting all aspects of an automotive career path, AUSMASA proposes to conduct a targeted review of the AUR training package to ensure key elements remain fit for purpose.

Elements of the review would focus on:

- Qualifications with historically low or no enrolments.
- The ability for training providers to train students on the required modern equipment/vehicles to produce credible training outcomes, creating a benchmark of what best practice looks like.
- The potential and desirability of mechanical trade qualifications to incorporate sufficient elements of both EV servicing technology and internal combustion engine (ICE) technology to prevent the need for dual-qualifications and/or skill sets to equip the workforce with the necessary skills to operate in an environment where both types of vehicles will be prevalent for decades to come.

Potential changes to the package's vocational preparation qualifications to ensure they adequately prepare students for higher-level VET training within the automotive industry and suitably expose students to a broad range of skills and vocational opportunities.



**STATUS:** This opportunity has been progressed via a number of separate projects.

- The qualifications with historically low and no enrolments has been advanced to a fully funded AAS project.
- Equipment requirements and benchmarking of best practice has been captured as part of the CMEV 10-point Strategic Plan and is being viewed as a key Industry Stewardship activity. This will include exploring ways of supporting industry and the VET sector as it relates to accessing appropriate equipment for training.
- The design of mechanical trade qualifications in light of both ICE and EV technologies is progressing with further industry engagement, which will include discussion of how Government EV targets could best be met by upskilling and/or growing the workforce.
- Potential changes to the package's Certificate II qualifications are being progressed via a pilot Automotive Demonstration Project in support of the Qualification Reform Design Group activities.

## Opportunity 2

The AUM and RII training packages should also be reviewed for qualifications with historically low or no enrolments, determining their ongoing fit for purpose or other strategies to promote their uptake.

**STATUS:** Project commenced, see [current projects](#) for more information



### Opportunity 3

The Gen-Z research undertaken by AUSMASA has been particularly insightful for establishing Generation Z's views towards the mining industry. While the automotive industry believes that a number of those findings would also hold true for their industry, there is no data to support those views.

Understanding Generation Z's perceptions of the automotive industry would assist in developing specific vocational preparation courses and inform strategies for better promoting the industry to potential new entrants.

As such, a research project to identify the public perception of the automotive industry is proposed.

**STATUS:** Project commenced, see [current projects](#) for more information

### Opportunity 4

AUSMASA proposes to work with key mining industry employers with the view of establishing a research project that collects de-identified exit interview data and explores reasons for workers choosing to change employers within the industry or leave the industry altogether.

Such data would provide valuable insights into what workforce attraction and retention strategies are working, why people choose to leave the industry completely and what role, if any; training opportunities, or lack thereof; or challenges in adapting to new technologies or processes played a part in the worker's decision to leave.



**STATUS:** Reevaluating best approach, noting Jobs and Skills Australia is conducting research into occupation mobility (Data of Occupation Mobility (DOM)) that should meet the desired outcome of this priority.

## Opportunity 5

Understanding the current skills landscape, especially for key roles in both the mining and automotive industries, coupled with a skills map of what will be required in the future for both existing and any new roles, is critical for the development of responsive training packages that meet current and forecasted skills gaps.

AUSMASA proposes undertaking a comprehensive skills mapping exercise for key roles in both industries, for both the current and future state. The key roles of focus will be based on the top roles identified for each industry in this Workforce Plan and further refined through stakeholder feedback.

Aspects of such a project would include:

- Current skills identification of key roles in both industries
- Skills identification of future needs, be they for the same roles or, in the case of role augmentation or transformation, new roles (i.e., critical minerals processing, service and repair of hydrogen vehicles or end-of-life recycling of batteries)
- The development of both present state and future state 'personas'
- Comprehensive skills gap analysis
- Mapping of identified skills against current qualifications

**STATUS:** Project commenced, see [current projects](#) for more information



## Opportunity 6

Utilising the insights gathered from the skills-mapping project, it is proposed that the RII training package elements that deal with mineral processing are reviewed to ensure they are fit for purpose in supporting increased critical minerals onshore refining and processing activities.

**STATUS:** Pending completion of the skills-mapping project

## Opportunity 7

As identified in this plan, car detailers represent a sizable component of the automotive industry workforce. Car detailers would generally be classified as ANZSCO Skill Level 5 occupation where the level of skill is commensurate with an Australian Qualifications Framework (AQF) Certificate I or compulsory secondary education and possibly some on-the-job training. Given car detailer's existing engagement with the industry, AUSMASA proposes to explore what support, including potential Language, Literacy and Numeracy training, is necessary to encourage car detailers to consider a trade in the industry (Light Vehicle Mechanic, Auto Electrician etc).

**STATUS:** Further industry engagement and research required



## Opportunity 8

It has already been identified that skilled migration should play an important part in helping to address skills gaps in the mining and automotive industries. Evidence to date suggests that it is failing to have the full desired impact.

AUSMASA proposes to engage with industry and others to ascertain key barriers to fully utilising skilled migration to assist in addressing skills shortages. As part of this, AUSMASA will seek to understand the relative contribution of employer-sponsored visas to each sector.

This project would also explore the role of Australian international education programs aligned with the mining and automotive industries, with a focus on producing graduates and could assist with skills shortages.

**STATUS:** Established as a key engagement project for AUSMASA within its industry stewardship remit. Ongoing stakeholder engagement taking place with updated findings and recommendations within this workforce plan.

## Opportunity 9

Complementing the skills-mapping project, AUSMASA proposes to undertake a thorough career progression-mapping exercise for both the mining and automotive industries, exploring current pathways for people to join the industries through entry into, through and beyond the VET environment.

Insights gained from this career pathway map could inform the development of new qualifications and skill sets, which could include:



- Specific qualifications and skill sets aimed at helping secondary students, career changers or workers impacted by workforce transformation to gain access to the mining and automotive industries.
- Revised and/or new qualifications and skill sets designed to assist in career progression aligned with the skills that the industry will need both now and in the future.
- Development of higher-education qualifications and/or programs to help workers prepare for and access university-grade disciplines in demand by the mining and automotive industries. Examples could include degree apprenticeships and associate degrees, noting that this supports the focus of the Employment White Paper on higher apprenticeships.

**STATUS:** Project commenced, see [current projects](#) for more information

## Opportunity 10

AUSMASA proposes to monitor the impact of industry initiatives to improve workplace culture, especially as it relates to bullying and sexual harassment. The most useful source of data to inform such progress would be from mining industry employers themselves based on internal reporting and investigation of incidents.

Additional insights would be gained from any changes in trends recorded by the Workplace Gender Equality Agency (WGEA), state-based commissioners and/or regulators and the Australian Human Rights Commission.

**STATUS:** Updated insights and observations provided in this workforce plan



## Opportunity 11

Valuable insights can be learned from investigating how other countries tackle similar skills challenges in their workforce. AUSMASA plans to gain a greater understanding of overseas skills and training strategies with a view of using this to inform other activities identified in this section of the workforce plan.

**STATUS:** Project scoping continuing

## Data Methodology

### Appendix H

#### Explanatory Notes to workforce demographic and occupational insights

AUSMASA's workforce analysis is based on the 2 key government classification systems: ANZSIC and ANZSCO.

- **ANZSIC** (Australian and New Zealand Standard Industrial Classification) classifies businesses into industry sectors, based on the primary activities they are engaged in.
- **ANZSCO** (Australian and New Zealand Standard Classification of Occupations) categorises all occupations and jobs using the skill-based classification.

The total workforce numbers are calculated by aggregating the workforce numbers of ANZSIC 3-digit groups from the Australian Bureau Statistics (ABS) quarterly Labour Force Survey (LFS).

The workforce numbers have been adjusted by averaging the figures for the last four quarters (May 2023 to February 2024) to accommodate the volatility and seasonal impacts on quarterly employment. This methodology also applies to Figure b - total workforce by State/Territory in each data dashboard.

To correctly capture the workforce cohorts relevant to each sub-industry, instead of LFS data, 2021 census data has been utilised to show the workforce characteristics in the age distribution (Figure c), highest education attainment (Figure d), workforce numbers by top occupations (Figure e) and workforce skill levels (Figure g).

#### Employment Projections

The employment projections in this report (pages 5, 7, 13 and figures f and h of data dashboards) are based on employment projections produced by Victoria University for Jobs and Skills Australia. It is noted the projections are based on a starting point of employment estimated in May 2023 using ABS LFS, which may not align with the employment figures from the latest LFS data (February 2024). It is advised to interpret the projections as how current trends could be expected to play out rather than the precise predictions of the future.

#### Explanatory Notes to Training Package Insights

The training package enrolments have been grouped by the qualifications that support relevant sub-industries.

- AUM qualifications have been mapped to Automotive Manufacturing sub-industry.
- AUR retail qualifications have been mapped to Automotive retail and wholesale sub-industry.
- AUR service and repair qualifications have been mapped to Automotive repair and maintenance sub-industry.



- RII Coal qualifications have been mapped to Coal mining sub-industry.
- RII field exploration and drilling operations qualifications have been mapped to the Exploration and Other mining support services sub-industry.
- The other RII qualifications are shared among the Metal Ore and Non-metallic mineral and quarrying.

## **Caveats in interpreting the training package data**

The Civil infrastructure qualifications under RII training packages have been excluded as these qualifications are outside of AUSAMSA's scope. BuildSkills Australia is responsible for RII civil infrastructure qualifications.

## **Data gaps and limitations**

- As addressed in the Critical Minerals section, there is a limitation with ANZSIC classifications in identifying the workforce for critical minerals. Even with the most granular level of ANZSIC codes, the workforces for critical minerals have been distributed across multiple ANZSIC classes with the other resource types that are not critical minerals. It would be beneficial to have a dedicated ANZSIC group to reflect the critical mineral workforce.
- Although NCVER enrolment data is useful in identifying trends, the ability for JSCs to also have access to statistical data on enrolments and completions by education providers would be highly useful. Such data could be used to inform specific engagement activities. It is noted that such data would be sensitive and incapable of being published but would still prove useful for internal strategic decision-making.
- NCVER data on apprenticeship commencements and completions is highly useful, though additional insights such as student progression (in terms of time and unit progression) at the time of apprenticeship discontinuation would aid in better identifying opportunities for intervention and redress

# Enrolment data tables

## Appendix I

The following NCVET data shows enrolment data for the 3 training packages under AUSMASA's remit (AUM, AUR and RII [mining only]). At the time of publication of the 2024 Workforce Plan, the most current enrolment statistics available were for 2022. AUSMASA will provide updated statistics to its stakeholders once 2023 enrolment data becomes available.

### TRAINING PACKAGE ENROLMENT DATA, 2022

Automotive Industry Manufacturing (AUM)		Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International Students	Release Status
AUM30218	Certificate III in Automotive Manufacturing Technical Operations - Bus, Truck and Trailer	468	96.6%	3.4%	209	70	428	-	Current
AUM20218	Certificate II in Automotive Manufacturing Production - Bus, Truck and Trailer	7	100.0%	0.0%	8	4	0	-	Current
<b>Total</b>		<b>475</b>	<b>96.6%</b>	<b>3.4%</b>	<b>217</b>	<b>74</b>	<b>428</b>	<b>-</b>	

## TRAINING PACKAGE ENROLMENT DATA, 2022 (page 1)

Resources and Infrastructure (RII Mining Qualifications only)	Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International students	Release Status
RII30120 Certificate III in Surface Extraction Operations	7,043	76%	21%	6,781	707	2,426	0	Current
RII20120 Certificate II in Resources and Infrastructure Work Preparation	4,376	80%	19%	4,219	1,191	65	0	Current
RII20220 Certificate II in Surface Extraction Operations	2,758	75%	22%	2,624	338	226	6	Current
RII30719 Certificate III in Emergency Response and Rescue	2,602	83%	16%	2,091	1,219	0	2	Current
RII31820 Certificate III in Drilling Operations	1,769	98%	2%	1,078	443	606	15	Current
RII20920 Certificate II in Drilling Operations	1,675	95%	5%	1,146	599	462	0	Current
RII30115 Certificate III in Surface Extraction Operations	1,501	84%	16%	624	314	523	0	Superseded
RII30420 Certificate III in Resource Processing	1,433	75%	24%	1,421	128	171	0	Current
RII40220 Certificate IV in Surface Coal Mining (Open Cut Examiner)	1,215	83%	14%	1,155	68	0	0	Current
RII20320 Certificate II in Underground Coal Mining	1,111	88%	12%	1,080	19	161	0	Current
RII20420 Certificate II in Underground Metalliferous Mining	661	79%	21%	601	253	51	0	Current
RII30220 Certificate III in Underground Coal Operations	600	96%	4%	545	68	87	0	Current
RII20215 Certificate II in Surface Extraction Operations	529	90%	10%	333	29	26	0	Superseded
RII40920 Certificate IV in Drilling Operations	508	97%	2%	324	137	168	1	Current
RII20515 Certificate II in Resource Processing	419	94%	6%	366	15	17	0	Superseded
RII21120 Certificate II in Oil & Gas Drilling (Onshore) and Well Servicing	418	92%	2%	341	121	10	0	Current
RII50120 Diploma of Surface Operations Management	377	88%	12%	341	126	19	0	Current
RII40420 Certificate IV in Underground Coal Operations	308	97%	3%	235	44	0	0	Current

## TRAINING PACKAGE ENROLMENT DATA, 2022 (page 2)

Resources and Infrastructure (RII Mining Qualifications only)	Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International students	Release Status
RII32220 Certificate III in Well Servicing Operations	207	100%	0%	154	40	0	0	Current
RII40120 Certificate IV in Surface Extraction Operations	206	94%	4%	194	64	9	0	Current
RII20213 Certificate II in Surface Extraction Operations	190	87%	12%	174	0	0	0	Superseded
RII30415 Certificate III in Resource Processing	159	89%	11%	115	26	37	0	Superseded
RII20115 Certificate II in Resources and Infrastructure Work Preparation	141	70%	29%	126	0	0	0	Superseded
RII30320 Certificate III in Underground Metalliferous Mining	122	87%	7%	112	26	8	0	Current
RII30113 Certificate III in Surface Extraction Operations	98	78%	15%	67	0	0	0	Superseded
RII50620 Diploma of Drilling Operations	87	100%	0%	69	31	0	0	Current
RII40320 Certificate IV in Underground Metalliferous Mining Operations	85	93%	6%	51	30	0	0	Current
RII41220 Certificate IV in Well Servicing Operations	80	100%	0%	65	24	0	0	Current
RII50920 Diploma of Underground Coal Mining Management	78	85%	15%	64	14	0	0	Current
RII51020 Diploma of Well Servicing Operations	76	100%	0%	73	40	0	0	Current
RII31619 Certificate III in Trenchless Technology	72	100%	0%	59	19	60	0	Current
RII10115 Certificate I in Resources and Infrastructure Operations	69	55%	45%	69	33	0	0	Current
RII32020 Certificate III in Drilling Oil & Gas (Onshore)	66	97%	0%	55	37	0	0	Current
RII41120 Certificate IV in Drilling Oil & Gas (Onshore)	55	100%	0%	46	38	0	0	Current
RII50115 Diploma of Surface Operations Management	53	89%	11%	2	15	0	0	Superseded

## TRAINING PACKAGE ENROLMENT DATA, 2022 (page 3)

Resources and Infrastructure (RII Mining Qualifications only)	Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International students	Release Status
RII50820 Diploma of Drilling Oil & Gas (Onshore)	49	96%	0%	32	33	0	0	Current
RII40213 Certificate IV in Surface Coal Mining (Open Cut Examiner)	35	60%	34%	30	0	0	0	Superseded
RII41319 Certificate IV in Emergency Response Coordination	35	83%	17%	31	2	0	0	Current
RII20520 Certificate II in Resource Processing	24	75%	25%	22	5	25	0	Current
RII30520 Certificate III in Mining Exploration	24	92%	8%	28	10	0	0	Current
RII40315 Certificate IV in Underground Metalliferous Mining Operations	20	100%	0%	13	0	0	0	Superseded
RII20415 Certificate II in Underground Metalliferous Mining	18	100%	0%	14	20	0	0	Superseded
RII31815 Certificate III in Drilling Operations	18	89%	11%	0	0	11	0	Superseded
RII60320 Advanced Diploma of Underground Coal Mining Management	18	100%	0%	9	9	0	0	Current
RII30111 Certificate III in Surface Extraction Operations	17	88%	12%	11	0	0	0	Superseded
RII40415 Certificate IV in Underground Coal Operations	17	100%	0%	0	0	0	0	Superseded
RII60415 Advanced Diploma of Drilling Management	16	100%	0%	6	11	0	2	Current
RII40115 Certificate IV in Surface Extraction Operations	15	100%	0%	17	6	0	0	Superseded
RII30315 Certificate III in Underground Metalliferous Mining	14	100%	0%	2	6	8	0	Superseded
RII40215 Certificate IV in Surface Coal Mining (Open Cut Examiner)	14	100%	0%	7	0	0	0	Superseded
RII60220 Advanced Diploma of Extractive Industries Management	11	100%	0%	5	3	0	0	Current

### TRAINING PACKAGE ENROLMENT DATA, 2022 (page 4)

Resources and Infrastructure (RII Mining Qualifications only)	Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International students	Release Status
RII50915 Diploma of Underground Coal Mining Management	10	100%	0%	0	0	0	0	Superseded
RII32218 Certificate III in Well Servicing Operations	6	100%	0%	0	0	0	0	Superseded
RII41115 Certificate IV in Drilling Oil & Gas (On shore)	6	100%	0%	0	0	0	0	Superseded
RII60215 Advanced Diploma of Extractive Industries Management	6	67%	33%	0	0	0	0	Superseded
RII20915 Certificate II in Drilling Operations	5	100%	0%	0	0	4	0	Superseded
RII30715 Certificate III in Mine Emergency Response and Rescue	4	100%	0%	0	4	0	0	Superseded
RII20620 Certificate II in Mining/Field Exploration	2	100%	0%	2	0	2	0	Current

## TRAINING PACKAGE ENROLMENT DATA, 2022 (page 1)

Automotive Industry Retail, Service and Repair (AUR)	Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International Students	Release Status
AUR30620 Certificate III in Light Vehicle Mechanical Technology	15,618	95.4%	4.5%	13,156	2,075	10,064	4,557	Current
AUR30616 Certificate III in Light Vehicle Mechanical Technology	11,127	95.6%	4.3%	1,822	3,855	7,638	2,688	Superseded
AUR20720 Certificate II in Automotive Vocational Preparation	9,778	86.8%	13.0%	9,490	2,286	13	1	Current
AUR31116 Certificate III in Heavy Commercial Vehicle Mechanical Technology	4,551	95.9%	4.1%	1,049	1,284	3,828	231	Superseded
AUR40216 Certificate IV in Automotive Mechanical Diagnosis	4,378	97.8%	2.1%	2,842	2,829	0	3,937	Current
AUR31120 Certificate III in Heavy Commercial Vehicle Mechanical Technology	4,274	96.0%	4.1%	3,888	484	3,390	222	Current
AUR20716 Certificate II in Automotive Vocational Preparation	3,823	89.2%	10.6%	2,062	1,909	1	21	Superseded
AUR31216 Certificate III in Mobile Plant Technology	3,471	93.9%	5.9%	916	1,097	2,911	168	Superseded
AUR31220 Certificate III in Mobile Plant Technology	3,061	91.2%	8.5%	2,935	600	2,354	38	Current
AUR30320 Certificate III in Automotive Electrical Technology	2,772	91.6%	8.1%	2,525	390	1,930	354	Current
AUR50216 Diploma of Automotive Technology	2,664	98.0%	1.7%	1,793	1,532	0	2,588	Current
AUR30316 Certificate III in Automotive Electrical Technology	2,481	92.7%	7.5%	682	804	1,932	145	Superseded
AUR20520 Certificate II in Automotive Servicing Technology	1,638	87.3%	12.8%	1,563	449	248	12	Current
AUR20516 Certificate II in Automotive Servicing Technology	1,635	86.8%	12.9%	856	564	177	0	Superseded
AUR20220 Certificate II in Automotive Air Conditioning Technology	1,527	97.2%	2.0%	1,423	1,176	121	0	Current
AUR31020 Certificate III in Automotive Sales	1,277	75.8%	23.5%	1,114	93	744	0	Current
AUR10120 Certificate I in Automotive Vocational Preparation	1,217	80.5%	19.4%	1,177	635	72	0	Current

## TRAINING PACKAGE ENROLMENT DATA, 2022 (page 2)

Automotive Industry Retail, Service and Repair (AUR)	Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International Students	Release Status
AUR32416 Certificate III in Automotive Refinishing Technology	1,105	89.5%	10.3%	251	307	1,005	5	Superseded
AUR32120 Certificate III in Automotive Body Repair Technology	1,002	97.4%	2.2%	793	89	937	1	Current
AUR32116 Certificate III in Automotive Body Repair Technology	989	97.3%	2.2%	217	270	863	49	Superseded
AUR32420 Certificate III in Automotive Refinishing Technology	982	89.9%	10.0%	797	83	907	0	Current
AUR21920 Certificate II in Automotive Tyre Servicing Technology	964	95.1%	3.3%	817	330	299	0	Current
AUR31016 Certificate III in Automotive Sales	958	82.9%	17.0%	509	162	473	0	Superseded
AUR20218 Certificate II in Automotive Air Conditioning Technology	894	96.6%	3.5%	533	773	73	11	Superseded
AUR30420 Certificate III in Agricultural Mechanical Technology	795	97.0%	3.5%	728	63	772	0	Current
AUR30416 Certificate III in Agricultural Mechanical Technology	615	96.9%	2.9%	113	149	552	0	Superseded
AUR50116 Diploma of Automotive Management	611	95.4%	3.9%	380	232	0	535	Current
AUR30816 Certificate III in Motorcycle Mechanical Technology	487	94.7%	3.9%	124	124	433	0	Superseded
AUR30820 Certificate III in Motorcycle Mechanical Technology	482	95.0%	5.8%	394	21	459	0	Current
AUR30516 Certificate III in Marine Mechanical Technology	463	98.1%	1.7%	139	122	405	0	Superseded
AUR20416 Certificate II in Automotive Electrical Technology	449	89.8%	9.4%	383	312	14	0	Superseded
AUR32220 Certificate III in Automotive Glazing Technology	347	90.5%	9.5%	223	9	347	0	Current
AUR30716 Certificate III in Outdoor Power Equipment Technology	260	94.6%	2.7%	71	61	232	0	Superseded



### TRAINING PACKAGE ENROLMENT DATA, 2022 (page 3)

Automotive Industry Retail, Service and Repair (AUR)	Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International Students	Release Status
AUR32518 Certificate III in Automotive Underbody Technology	255	99.6%	1.2%	99	49	237	0	Current
AUR30520 Certificate III in Marine Mechanical Technology	226	97.3%	2.7%	226		210	0	Current
AUR20420 Certificate II in Automotive Electrical Technology	221	88.7%	10.9%	214	106	25	0	Current
AUR20916 Certificate II in Automotive Body Repair Technology	185	88.6%	11.9%	40	65	72	0	Superseded
AUR30720 Certificate III in Outdoor Power Equipment Technology	185	95.7%	4.9%	167	5	180	0	Current
AUR20920 Certificate II in Automotive Body Repair Technology	176	92.0%	7.4%	146	76	75	0	Current
AUR30220 Certificate III in Bicycle Workshop Operations	162	91.4%	7.4%	158	21	77	0	Current
AUR31520 Certificate III in Automotive Diesel Engine Technology	138	98.6%	0.0%	102	45	25	104	Current
AUR40820 Certificate IV in Automotive Mechanical Overhauling	120	96.7%	1.7%	63	80	0	114	Current
AUR21220 Certificate II in Automotive Underbody Technology	103	89.3%	4.9%	76	33	71	0	Current
AUR31316 Certificate III in Automotive Engine Reconditioning	89	98.9%	0.0%	19	17	79	0	Current
AUR21820 Certificate II in Automotive Steering and Suspension System Technology	80	85.0%	7.5%	60	21	20	0	Current
AUR21916 Certificate II in Automotive Tyre Servicing Technology	78	97.4%	3.9%	64	9	5	0	Superseded
AUR32216 Certificate III in Automotive Glazing Technology	74	95.9%	1.4%	2	44	74	0	Superseded
AUR20820 Certificate II in Outdoor Power Equipment Technology	69	101.4%	1.5%	69	59	0	0	Current
AUR20320 Certificate II in Bicycle Mechanical Technology	64	85.9%	9.4%	58	56	1	0	Current

### TRAINING PACKAGE ENROLMENT DATA, 2022 (page 4)

Automotive Industry Retail, Service and Repair (AUR)	Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International Students	Release Status
AUR32320 Certificate III in Automotive and Marine Trimming Technology	61	77.0%	19.7%	61	11	58	0	Current
AUR40416 Certificate IV in Automotive Performance Enhancement	59	93.2%	1.7%	56	57	0	59	Deleted
AUR30116 Certificate III in Automotive Administration	56	19.6%	62.5%	33	11	54	0	Current
AUR30920 Certificate III in Motor Sport Technology	51	82.4%	9.8%	28	11	0	0	Current
AUR21520 Certificate II in Automotive Cylinder Head Reconditioning	49	95.9%	2.0%	49	34	0	0	Current
AUR32316 Certificate III in Automotive and Marine Trimming Technology	49	89.8%	12.2%	3	18	51	0	Superseded
AUR40620 Certificate IV in Automotive Electrical Technology	47	100.0%	0.0%	29	28	0	34	Current
AUR31820 Certificate III in Heavy Commercial Trailer Technology	45	100.0%	0.0%	30	9	43	0	Current
AUR30216 Certificate III in Bicycle Workshop Operations	42	88.1%	4.8%	21	12	31	0	Superseded
AUR40116 Certificate IV in Automotive Management	28	85.7%	10.7%	21	8	8	7	Current
AUR10116 Certificate I in Automotive Vocational Preparation	27	85.2%	29.6%	24	21	0	0	Superseded
AUR31420 Certificate III in Automotive Diesel Fuel Technology	23	108.7%	4.4%	13	7	22	0	Current
AUR40720 Certificate IV in Automotive Body Repair Technology	12	100.0%	0.0%	12	10	0	8	Current
AUR40816 Certificate IV in Automotive Mechanical Overhauling	11	100.0%	0.0%	11	14	0	11	Superseded
AUR21120 Certificate II in Automotive Sales	6	33.3%	33.3%	4	3	6	0	Current
AUR31816 Certificate III in Heavy Commercial Trailer Technology	5	100.0%	0.0%	3	4	5	0	Superseded
AUR20316 Certificate II in Bicycle Mechanical Technology	4	100.0%	0.0%	0	0	4	0	Superseded

## TRAINING PACKAGE ENROLMENT DATA, 2022 (page 5)

Automotive Industry Retail, Service and Repair (AUR)	Total Enrolments	% Male	% Female & Other	Commencements	Total Completions	Apprentices / Trainees	International Students	Release Status
AUR32721 Certificate III in Automotive Electric Vehicle Technology	4	100.0%	0.0%	4		0	0	Current
AUR40320 Certificate IV in Motor Sport Technology	4	100.0%	0.0%	4		0	0	Current
AUR21816 Certificate II in Automotive Steering and Suspension System Technology	3	100.0%	0.0%	0	3	5	0	Superseded
AUR31616 Certificate III in Automotive Drivetrain Technology	2	100.0%	0.0%	0	0	2	0	Deleted
AUR40616 Certificate IV in Automotive Electrical Technology	2	100.0%	0.0%	2	0	0	0	Superseded
AUR31516 Certificate III in Automotive Diesel Engine Technology	1	100.0%	0.0%	0	0	0	0	Superseded
<b>Total</b>	<b>89,511</b>	<b>93.0%</b>	<b>6.8%</b>	<b>57,736</b>	<b>26,116</b>	<b>44,634</b>	<b>15,900</b>	

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