TASMANIAN TRANSPORT AND LOGISTICS INDUSTRY

Workforce Plan 2020 - 2023

TASMANIAN TRANSPORT ASSOCIATION

TTLWAG
TASMANIAN TRANSPORT AND LOGISTICS WORKFORCE ADVISORY GROUP

COVID-19

This Plan, including the research and consultations undertaken to prepare it, was developed during the latter part of 2019, before the onset of the coronavirus pandemic. Consequently, some of the strategic actions referenced in the plan may take higher priority as Tasmania emerges from the shut-down measures implemented to contain the spread of COVID-19. Transport and Logistics has provided an essential service, critical to maintaining the way of life for Tasmanian's during the pandemic and will continue to provide these services essential to the economic recovery of Tasmania as we enter the revitalisation stages and stimulate the economy.

Disclaimer

Acknowledgements

Project Manager	Tasmanian Transport Association
Project Sponsor	Tasmanian Transport and Logistics Workforce Advisory Group
Project Consultant	The Work Lab
Project Officer	Workforce Innovations
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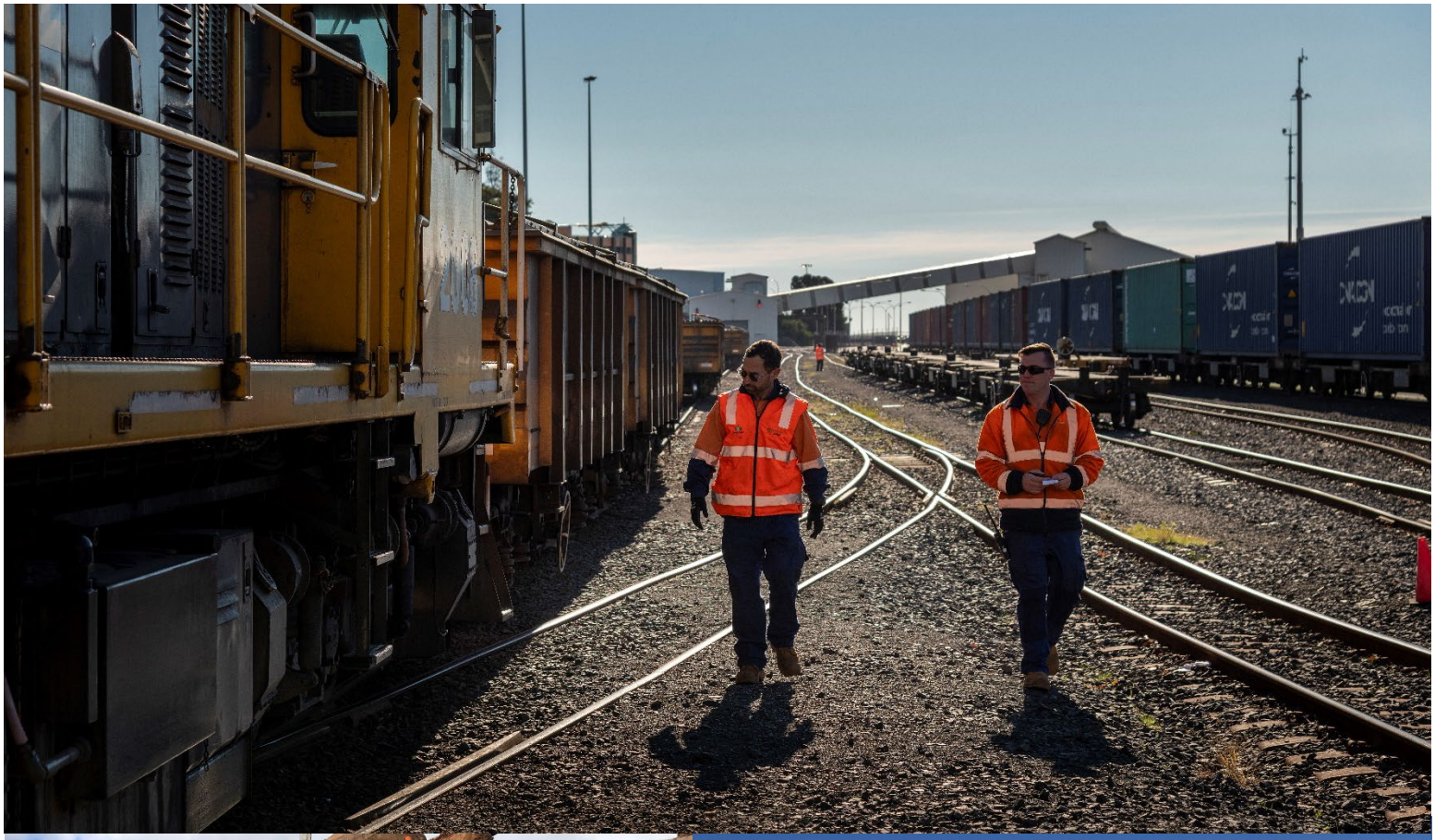
About this Plan

Transport and Logistics in Tasmania

References



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Foreword

Before the onset of COVID-19, and the resulting impacts on freight supply chains, Tasmania's economy was booming; the fastest growing in the nation on a per-capita basis and at nearly double the national average.

In the immediate term, COVID-19 has had a devastating impact on Tasmanian industry particularly in tourism, hospitality and retail sectors, and has resulted in some initial slowing of activity in the transport sector. The Tasmanian transport industry has worked throughout the crisis, providing essential services for Tasmanians and Tasmanian businesses. Transport businesses have taken steps to ensure responsible and COVID-safe practices in their operations through development of workplace safety plans, and with the support and cooperation of workers.

The medium to long term impacts of COVID-19 on Tasmania's economic and social wellbeing are yet to be understood. The Premier has established an Economic and Social Recovery Advisory Council, with the brief to provide advice and recommendations on how to best mitigate the economic and social impacts of the pandemic and to identify opportunities for economic and social recovery.

As a critical service provider, transport and logistics will underpin and actively enable economic and social recovery initiatives. Transport is the backbone of the Tasmanian economy; facilitating growth in key sectors of construction, agriculture, aquaculture, and exports, and the Tasmanian government has committed to a record investment in infrastructure to underpin ongoing economic growth. As an Island state, an efficient freight network within Tasmania, and connections with interstate ports and freight hubs, is critical to the continued economic prosperity of Tasmanian businesses and the living standards of all Tasmanians.

To enable the stimulus and recovery of the Tasmanian economy, it is critical to ensure workforce capacity and capability to underpin a safe, efficient, productive, sustainable and responsive transport and logistics sector in Tasmania.

The Tasmanian Industry, across all sectors, is experiencing considerable challenges to attract, recruit, develop and retain the workforce needed to meet the freight task of today and the (previously) predicted increase in the next 3 – 5 years.

The Tasmanian Transport and Logistics Workforce Advisory Group (TTLWAG) in consultation with key stakeholders has prepared this Workforce Plan. It sets the workforce development and planning priorities for, and commitments from, the Tasmanian Transport and Logistics industry for the next three years. Although the Plan was consulted and largely developed before the COVID-19 crisis, the strategic actions recommended remain valid and some may assume even greater significance in the context of supporting an economic recovery.

Implementing the actions recommended in this Plan will require a collaborative approach within the transport and logistics industry, across other inter-related industries, with government, training and education providers and other stakeholders. This work will be led by the TTLWAG – the group with responsibility for research and advice to industry and government on workforce issues for transport and logistics in Tasmania, and the Tasmanian Transport Association (TTA), as the peak industry body representing the interests of transport operators in Tasmania.

We thank the members of the TTLWAG, industry and the project officers for their contributions to this Plan and look forward to working with our industry and stakeholders on the critical actions that are needed to develop our workforce capacity and capability.

Michelle Harwood
Chair – TTLWAG

John de Bruyn
Chairman – Tasmanian Transport Association


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Executive Summary

This Workforce Plan sets out strategic activities needed to enable Tasmania's transport and logistics industry businesses, workers, students and educators, to develop workforce capacity and capability to meet the needs of the growing freight task and improve productivity, safety and community awareness of the industry, which underpins the overall Tasmanian economy.

The Plan is designed to inform all stakeholders to the industry, including:

- Transport and logistics businesses
- Education and training providers across all sectors
- Careers advisors and Job Active network participants
- Skills Tasmania, the Tasmanian Department of State Growth and the Tasmanian Government

The Tasmanian transport industry is growing, reflecting the growth in the Tasmanian economy. The industry is made up of around 2352 businesses[1], two-thirds of which are small enterprises or single person operations. Businesses numbers in the industry have increased from 2017–2018 by 228, the greatest increase in registered business numbers of any industry in Tasmania.

The Tasmanian industry directly employs 10,540 people (as at February 2020), with almost half of these (5092) engaged in the Road Transport sector.[2] Employment numbers in the industry have varied from 9,700 in February 2017 to 12,800 in May 2018.[3]

Tasmania is primarily an export state and road, rail, air and sea freight transport is crucial for the movement of goods and for growth in the Tasmanian economy. The Tasmanian Integrated Freight Strategy sets out a projected 65% increase in the land-freight task from 23 million tonnes in 2011-2012, to 38 million tonnes by 2035. Most of this increase will be assumed by road, with 82% of net tonne kilometres currently borne by road.[4]

The industry is experiencing considerable workforce challenges to resource the projected growth in the freight task. Many of these challenges are not unique to the transport and logistics industry and have common themes across other industries.

The challenges are manifested across the workforce stages of **attraction**, **recruitment**, **development** and **retention**, and include:

- increased competition from other industry sectors for employment opportunities in the context low unemployment
- an ageing workforce, with a large proportion reaching retirement age in the next decade
- poor / limited community understanding and appreciation of the role of transport and logistics, and the range of opportunities for rewarding careers in the industry
- limited access to local training and education providers with expertise in transport and logistics and to the full range of education and training programs needed to advance industry priorities for safety, compliance, productivity and professionalism
- multiple licensing requirements with underpinning unit of competency pre-requisites, embedded within the VET system with limited provider options. A related challenge is with an accepted

[1] idCommunity demographic resources, State Growth Tasmania economic profile, accessed at: https://economy.id.com.au/tasmania/number-of-businesses-by-industry?BType=600 and Transport Industry Workforce Plan 2015-18
[2] ibid
[3] Detailed Quarterly Labour Force Data, Employed persons by State, Territory and Industry division of main job (ANZSIC), ABS, 6291.0.55.003

[4] Land Freight Infrastructure, Information Paper 4, Tasmanian Department of State Growth, accessed at: https://www.stategrowth.tas.gov.au/__data/assets/pdf_file/0013/134212/Information_Paper_4_-_Land_freight_infrastructure.pdf

understanding of 'competency'; tensions between licensing standards and industry operational competency expectations and requirements

- shifting client needs particularly with a move to increased reliance on 3PL, 4PL and even 5PL solutions
- increasing expectations of customers and pressures for supply chain transparency
- tensions between low barriers to entry vs increased safety and compliance expectations and complexity
- emerging technologies across all industry operations, with opportunities for greater application and integration of a range of industry technologies, some of which are competing
- multi- layered regulatory environment with a high compliance standard including
    - Chain of Responsibility (CoR) provisions establishing duties of supply chain parties and a shared responsibility for safety of the on-road activity, with increasing expectation across the supply chain for operators to implement formal safety management systems
    - WHS law and industry and sector specific laws, distinctions between these frameworks and the role of a range of regulators
    - increasing environmental standards and associated compliance requirements
    - uncertainty around change in the regulatory environment – eg, a whole-scale review of the Heavy Vehicle National Law is in progress; outcomes will impact skills requirements

The nature of industry operations, characterised by shift work, long hours, high manual handling demands in many sectors, low workforce diversity, high personal accountability for compliance, and increasing digital and literacy demands, further compound challenges associated with attraction, recruitment, development and retention of the workforce for today and for the future.

This Plan provides a snapshot of the current industry and workforce, identifies key workforce challenges and priorities and proposes strategies for action. It sets a framework for workforce development and planning for the Tasmanian Transport and Logistics industry for the next three years.

This plan is an agreed and authoritative description of:

- the operating context for transport and logistics in Tasmania
- the workforce and skills needs of the Tasmanian Transport and Logistics Industry
- the recommended practical and actionable strategies to help meet those needs

The strategic actions recommended in this Plan are based on recommendations arising from industry consultation and research, aligned with the workforce stages of **attraction**, **recruitment**, **development** and **retention**, and aims to drive a culture of engagement in training and workforce planning in the sector.

The strategic actions will be progressed through projects over the life of this Plan. This Plan was funded by Skills Tasmania and development was coordinated and facilitated by The Work Lab and Workforce Innovations, with direction and input from the TTLWAG and the TTA.

This workforce development plan relates to the Tasmanian Government Ministerial Priorities 2018 – 2021.

1. Invest in training and workplace development activities in priority industries to drive economic growth and employment
2. Facilitate a high quality, responsive and flexible training system
3. Support TasTAFE to be a high quality, contemporary and responsive public provider
4. Support more apprenticeships and traineeships
5. Support all Tasmanians to access training and gain skills to participate in the workforce community
6. Promote vocational pathways in a modern economy

Transport and logistics is one of 9 priority industries for the Tasmanian training and workforce development system, expressed in the Ministerial Priorities for Training and Workforce Development.

Workforce Plan Snapshot

The key findings and actions are shown 'at a glance' below:

Current	Future Needs	Current Support/supply	Gaps	Actions	Industry Priority to Address
10,540 people **2352 businesses**	New entrants required across all sectors.	Disparity between skills and experience required by industry and market availability	Drivers Trainers & Assessors Supervisors Mechanics	Explore mentoring, and alternate training options	Skills Professionalism
Ageing workforce	'Replacement and renewal' workforce	Pilot program for Careers on the Move successfully run	Support for mainstreaming Job Ready programs Cadetships Low awareness	Government and industry support and resources to cycle programs and cadetships	Recruitment Awareness
Recruitment for replacement	New and innovative recruitment approach	Disparity between need and approach	Support for industry-wide approach	Recruitment based on data and profiling (roles and community)	Recruitment Skills Awareness
Increased digital landscape	Tech knowledge, usage, and implementation	Ad hoc or incomplete training Costly investment for compliance tech for smaller businesses	Warehousing, GPS, and compliance	Support in training, accessing new tech to support smaller businesses	Skills Awareness
80% male workforce	More diversity to fill gaps and enhance attractiveness	Pilot program for Women Behind the Wheel successfully run	Support for mainstreaming the pilot program	Government and industry support to cycle programs	Recruitment Awareness
Limited local training infrastructure	Local training to deliver high needs skills	Ongoing reduction of training organisations and enrolments. High reliance on private training sector vs public	Cert III in Driving Operations Cert III in Logistics Issues with access to heavy vehicle driver licence training and assessment	Provide opportunities for industry to partner with RTOs Recognise and incentivise efforts of industry to provide training opportunities	Skills Professionalism
Skills gaps in occupations, soft skills and cross-sector skills	Targeted industry-wide training. Improved co-ordination of training and skills development	High reliance on business to meet training costs and address gaps	Need for soft skills & cross-sector skills	Progressive industry model Target skill sets aligned with safety, regulation and productivity	Skills Awareness
Focus on compliance training	Stronger workforce development culture	Training limited /generic/ unavailable / costly Too much red tape	Support for smaller operators	Establish support for alternate training options	Skills Awareness
Poor industry image	Industry and community connections	Dependence on knowledge of schools' programs	Clear career pathways. Industry career resources. 'Job taster' programs	Establish connections to career programs	Recruitment Awareness

Summary of Recommendations

Recommendation 1

That the Tasmanian Government, through Skills Tasmania accept this workforce plan as the authoritative plan setting out the priorities for workforce development in the Tasmanian Transport and Logistics Industry.

Recommendation 2

That Tasmanian Government, through Skills Tasmania, provide dedicated resources to assist the TTLWAG progress the Strategic Actions to implement this Workforce Development Plan. Specific resource needs will be quantified in project proposals by the TTLWAG.

Recommendation 3

That the TTLWAG progress the development of complementary, sector-specific micro workforce plans to articulate challenges/solutions unique to each sector.

Recommendation 4

That the TTA and the TTLWAG promote this Plan through a launch, communications campaign, and use the Plan to catalyse discussions and the establishment of Industry / Education networking forums.

Recommendation 5

That the TTA and TTLWAG track implementation of the Strategic Actions in this Plan and regularly communicate progress with stakeholders.

For details of specific actions, see the Strategic Actions summarised from the Plan following.

Implementation of this Plan

Strategic Actions are proposed in this plan, aligned with priority themes identified through the consultations and referenced to workforce development stages.

Engagement and participation by industry and education stakeholders, through the TTLWAG and TTA, is critical to the implementation of this Plan.

Increased involvement with the education and training system by industry will provide connectivity and industry intelligence, necessary to inform stakeholders (including government) of demand and for the continuous improvement in the development of training programs, funding support and services. This can be facilitated by:

- regular state-wide networking meetings that include RTO, training specialist, and government representatives, in addition to other stakeholders
- support by government to help address licensing related qualifications issues, in particular the limited number of RTOs offering the qualifications, the high wait times, disassociation from formal contracts of training and full qualifications, and the cost related issues
- exploring alternate training models to help support, amongst other activities, driver training and skills acquisition, through mentoring programs
- exploring options for partnerships between industry and education and training providers
- exploring the provision of a reduced TAE (Trainer and Assessor) qualification to allow mentors to 'coach for competency' and pass on important knowledge, rather than requiring a full Trainer and Assessor qualification.

A cultural shift, for industry to advance workforce planning, could be supported by:

- industry attending regular networking events with a focus on sharing industry information, providing training and training updates, and building cross-sector relations, with the aim of creating a cultural shift
- the TTA / TTLWAG providing resources and/or a service to support industry workforce development
- a dedicated resource, under the auspices of the TTA / TTLWAG, to enhance a Workforce Development and Training focus within the industry, including regular onsite business support, and to improve communication within the industry. This resource would also ensure that smaller organisations that do not normally have access to human resources related support, are able to access aid, expertise and information, without having to seek out expensive third-party consultancy.

The current practice to addressing any labour or skills shortage is through customary or traditional recruitment channels. The regular movement of staff between organisations or the 'poaching' of the workforce without adding to the workforce numbers to a significant level was raised regularly during consultations. It was recognised that new approaches needed to be taken to change the workforce dynamic and to improve recruitment outcomes. Strategic actions in recruitment include improving industry knowledge on job, aptitude and attitude to improve candidate pools via profiling, and improving understanding of the community profile to match with advertising and recruitment practices via big data. Other strategies included documenting case studies as exemplars and sharing information via TTA / TTLWAG networking events to ensure that industry can build on these successes.

VR or simulator technology was noted as having potential to positively 'market' the industry to a newer and younger share of the community, whilst also providing potential for skills acquisition for roles including driving, warehousing, logistics and ports.

For the industry to truly invest time and resources into workforce planning and development and to realise the benefits, support mechanisms need to be established and communicated to industry, to facilitate:

- sharing important and relevant industry information
- providing expertise on workforce development activities
- involvement and engagement of smaller operators

Whilst the industry is facing challenging times in relation to current sustainability and future work projections, it is evident that, with the combination of an aging workforce, retrenchments, attrition, retirements, and the lack of alternate recruitment activity, the existing workforce will deplete in terms of its skills base. The cost of rebuilding the workforce based on reactive response plans creates the inevitable labour shortage, followed by the skill shortage. The passing on of skills is vital. Stakeholders were keen to ensure that knowledge was not lost and considered an industry wide mentoring program, supported by the TTA, would be an appropriate mechanism to ensure knowledge and experience transfer.

The role of the industry peak body, the Tasmanian Transport Association, is therefore critical in providing leadership and governance of this workforce plan. This is not without its challenges and requires deliberate connection and collaboration with Government, education providers, and peak bodies with a shared interest. It is clear that industry also needs to buy into this process.

A multi-level change strategy is recommended to ensure success and this is recommended in the Strategic Actions section of this plan.

Strategic Actions

Strategic actions identified through industry consultations are organised against the 4 **Themes** prioritised by industry; Awareness, Attraction, Skills, Professionalism.

Each theme is presented with a **Vision** for of workforce development in the Tasmanian Transport and Logistics Industry

Theme	AWARENESS	ATTRACTION	SKILLS	PROFESSIONALISM
Vision	▸ The Tasmanian Transport and Logistics industry is recognised as a professional, safe, rewarding industry offering a range of jobs with strong career pathways. ▸ Transport and Logistics is viewed as the backbone of the Tasmanian economy and an industry of opportunity. ▸ Transport and Logistics is an attractive industry for job seekers.	▸ Transport and Logistics businesses in Tasmania have clear, effective and reliable recruitment processes and programs. ▸ Clear industry entry points and pathways are available for occupations in the Tasmanian Transport and Logistics Industry. ▸ Recruitment practices support industry to achieve a younger and more diverse workforce.	▸ Education and Training is readily available and responsive to Transport and Logistics Industry workforce development needs. ▸ Transport and Logistics Businesses effectively engage with Education and Training providers to support workforce development. ▸ Education and Training Providers effectively engage with the Transport and Logistics Industry to develop and resource services needed by industry.	▸ Transport and Logistics businesses are operating effectively, safely and professionally; complying with relevant laws, regulations and expectations of customers and the community.

These are further organised to reflect the **Workforce Development stages** of Attraction, Recruitment, Development and Retention.

THEME	AWARENESS				
VISION	▸ The Tasmanian Transport and Logistics industry is recognised as a professional, safe, rewarding industry offering a range of jobs with strong career pathways. ▸ Transport and Logistics is viewed as the backbone of the Tasmanian economy and an industry of opportunity. ▸ Transport and Logistics is an attractive industry for job seekers.				
STRATEGIC ACTIONS		WORKFORCE DEVELOPMENT STAGE			
		Attract	Recruit	Develop	Retain
1	Develop and implement a marketing strategy to: a) raise awareness of the critical role of transport and logistics enabling the Tasmanian economy and community standards of living b) promote the Tasmanian Transport Industry as a safe, technologically advanced, professional and rewarding industry to work in. Marketing and promotion to include industry representatives, from a variety of Tasmanian organisations and sectors, participate in career days, career fairs, and school visits for the purpose of promoting opportunities within the industry and generating interest in industry careers	■	■		■
2	Develop and implement marketing materials for occupations in demand, targeting specific job seeker profiles to address issues of aging workforce, lack of diversity in workforce and to respond to areas of critical shortage in labour market supply. These kits to provide 'real-life' information about what new entrants can expect in and from the industry	■	■		
3	Establish a networking calendar to engage Transport and Logistics Industry members with education and training providers, career advisors, job agencies, employment networks, to: a) explore issues relevant to industry – for example, emerging technologies and their application to industry operations, changes to regulations, industry accreditation systems, industrial relations b) communicate current funding models for education and training, changes to qualification structures and content c) promote the industry and the range of careers in the industry.	■	■	■	■

THEME	ATTRACTION
VISION	▸ Transport and Logistics businesses in Tasmania have clear, effective and reliable recruitment processes and programs. ▸ Clear industry entry points and pathways are available for occupations in the Tasmanian Transport and Logistics Industry. ▸ Recruitment practices support industry to achieve a younger and more diverse workforce.

STRATEGIC ACTIONS		WORKFORCE DEVELOPMENT STAGE			
		Attract	Recruit	Develop	Retain
4	Establish and document 'profiles' for key job roles in demand across industry	■	■	■	
5	Mainstream the Careers on the Move Program	■	■	■	
6	Assist industry to increase engagement with Schools based Apprenticeship Pathways	■	■	■	
7	Mainstream Job Ready Programs	■	■	■	
8	Revise and promote the "How To" Recruitment kits previously developed by TTLWAG, to provide current information, links and support for industry	■	■		
9	Document career path models for key occupations across industry showing clear entry points aligned with recruitment models such as Careers on the Move, Job Ready Programs, Schools based Apprenticeships, Apprenticeships, Traineeships, seasonal entry	■	■	■	■

THEME	SKILLS
VISION	▸ Education and Training is readily available and responsive to Transport and Logistics Industry workforce development needs. ▸ Transport and Logistics Businesses effectively engage with Education and Training providers to support workforce development. ▸ Education and Training Providers effectively engage with the Transport and Logistics Industry to develop and resource services needed by industry.

STRATEGIC ACTIONS		WORKFORCE DEVELOPMENT STAGE			
		Attract	Recruit	Develop	Retain
10	Develop and promote a register of specific qualifications and short course requirements aligned with critical occupations for each sector of Transport and Logistics, listing training and education providers servicing this need in Tasmania.			■	■
11	Identify gaps in capacity or capability and support industry / education and training provider engagement and alternative strategies to resource gaps. This may include support for businesses and providers to enter formal auspice arrangements, resource sharing arrangements, developing new programs and attracting new providers to support the Tasmanian industry.			■	■
12	Establish and promote a leadership development program for emerging supervisors and managers across Tasmanian Transport and Logistics sectors	■	■	■	■
13	Establish a suite of resources to support industry to provide enterprise based, non-accredited training related to industry developments, safety, productivity and compliance.			■	■
14	Establish the feasibility and application for Virtual Reality/simulator resources to address issues of training gaps in driver competency and to provide a marketing tool for industry awareness.	■	■	■	■
15	Establish industry mentors within transport businesses with coaching and mentoring skills to support transfer of knowledge and development of new entrants. Explore the provision of a reduced TAE qualification that will allow mentors to 'coach for competency' and pass on important knowledge, rather than requiring a full Trainer and Assessor qualification.	■	■	■	■
16	Establish a training brokerage to aggregate industry requirements and facilitate training offering to meet this demand. Areas identified as in demand: ▸ occupational licensing (including driver, dangerous goods, high risk work) ▸ compliance (including Chain of Responsibility, WHS, IR) ▸ tech skills ▸ management / operations /leadership / change management ▸ customer service			■	■
17	Investigate feasibility of providing a group training service to stimulate apprenticeship (both trade and higher level) activity, delivered through a partnership with existing models or establishment of a new service		■	■	■

THEME	PROFESSIONALISM
VISION	▸ Transport and Logistics businesses are operating effectively, safely and professionally; complying with relevant laws, regulations and expectations of customers and the community.

STRATEGIC ACTIONS		WORKFORCE DEVELOPMENT STAGE			
		Attract	Recruit	Develop	Retain
18	Develop and promote information about industry accreditation systems relevant to sectors of Transport and Logistics.			■	■
19	Establish an industry advisory service to connect industry with service providers including with apprenticeship and traineeship structures, recruitment agencies and other workforce development services.		■	■	■
20	Develop and promote a small business workforce capability development service, to support businesses improve workforce planning and development capability.	■	■	■	■
21	Establish and promote links with literacy resources for industry including the Tasmanian 26TEN network.			■	■

Past Transport & Logistics Workforce Development Plans

This is the third Workforce Plan developed by industry.

The Tasmanian Transport and Logistics Workforce Development Plan 2015 – 2018 catalysed several important projects and developed programs and resources to support industry, however the challenges identified in 2015 remain and are reaching critical levels.

Evaluation of the 2015-2018 noted that:

- Pain points remain around recruitment, diversity, and technology, industry compliance demands
- Recruitment support and materials (Kits) remain an important resource and efforts should be made to have them further developed and promoted to ensure pathway information is easily available to the industry
- Awareness within the industry of the TTLWAG and TTA as supporting industry bodies is high, with the industry open to providing greater support to TTA to facilitate a high quality and responsive workforce development system
- Continuation of popular and successful recruitment initiatives is backed by industry (Careers on the Move, Job-Ready and Women Behind the Wheel) and should be cycled with greater frequency and consistency to make them 'mainstream'
- The sub-sectors of the industry require their own micro workforce development plans to advance their specific workforce development needs within the transport and logistics industry
- Trainer and Assessor availability appears to have assumed a higher level of urgency, within industry and within Registered Training Organisations
- Access to training is a barrier for industry with timely access to local training critical (but not available) across common areas such as heavy vehicle driver licensing, Chain of Responsibility and Fatigue Management
- Licensing processes and difficulties remain high on the list of industry issues that need to be overcome as a matter of priority, with driver endorsement and compliance remaining a constant challenge
- Skills acquisition through career path opportunities and improvement is a common focus of all the sectors
- Despite some improvements in workforce diversity in general, it is not directly translating to diverse workforce demographics or into retention
- Image and culture are seen to be changing, but too slowly or not enough to be appreciated by the community
- The desire for a more professional industry remains significant within all sectors
- The compliance burden across occupations in the industry remains high and is viewed as a disincentive to careers within the industry

A report on the evaluation of the 2015 – 2018 Transport and Logistics Workforce Plan is available from the Tasmanian Transport Association.

What is Transport and Logistics?

Transport and Logistics is a broad and diverse industry. It may be further understood through the definitions provided below -

"**Transport and Logistics** is all about the way in which we move products, services and people, how we get products from the farm or factory through packing houses and dry or cold storage… with a good percentage of it being imported via our ports and airports, then clearance through customs and freight forwarders, and transported to warehouses and distribution centres, to wholesalers, on to the retailers and finally, most importantly – to YOU – the Customer!"[5]

The definition of "**Transport and Logistics"** from Commission of European Communities' "Freight Transport and Logistics Action Plan":

- Freight Transport Logistics Action Plan defines transport logistics as planning, organization, management, control, and execution of freight transport operations in the supply chain.

The definition of "**logistics**" from the "Council of Supply Chain Management Professionals":

- The process of planning, implementing, and controlling procedures for the efficient and effective transportation and storage of goods including services, and related information from the point of origin to the point of consumption for the purpose of conforming to customer requirements.

The Australian Apprenticeships Pathways defines "**Transport and Logistics"** in terms of what the industry covers:

- Transport and Logistics covers logistics, warehousing and the transport of freight and passengers. Freight transporters move goods by road, usually in vans, trucks or tankers. Passenger transport operators move people by road by bus or taxi. Postal and courier pick-up and delivery services form part of this sector.
- Logistics involves moving, storing and handling freight from a start point to an end point.

[5] TALC – Transport And Logistics Centre – Postcard Series

Transport: Keeping Tasmania Moving

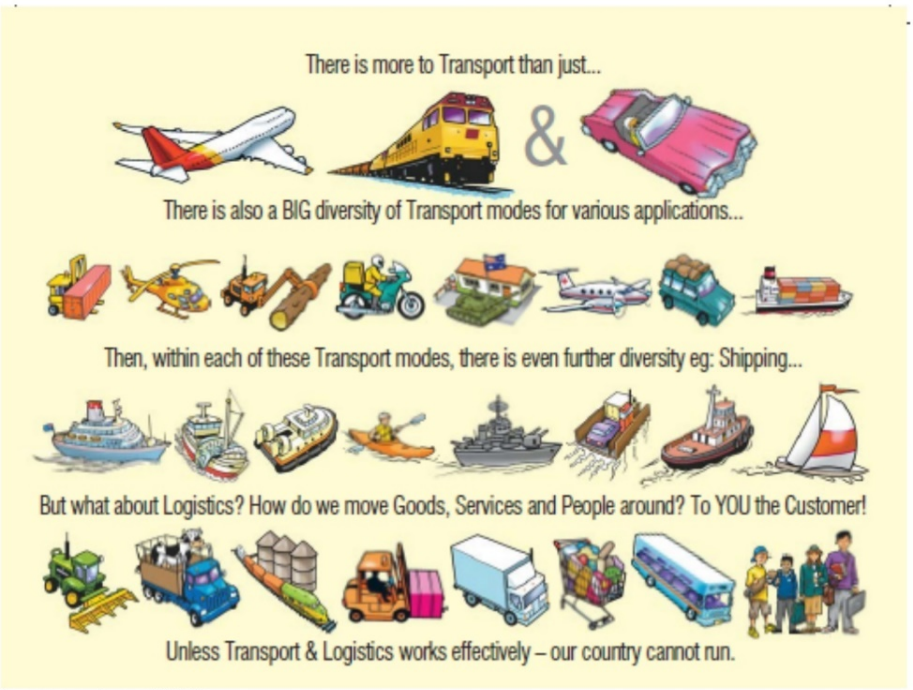

Image courtesy of TALC

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Careers on the Move

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Transport: Driving Tasmania's Economy

Image courtesy of TALC

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Careers on the Move

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The Tasmanian Transport and Logistics Industry

Transport and Logistics is a critical industry in Tasmania and a key contributor to the Tasmanian economy. The industry creates significant benefits that are shared across all sectors and regions and plays a vital role in Tasmania's economic and social development.

Transport in Tasmania includes a range of sub sectors, with largely common workforce development needs and challenges. Some priorities and needs are unique to sectors and may benefit from micro-workforce plans in future, but all sectors have challenges aligned with the workforce cycle of attraction, recruitment, development and retention.

Industry Subsectors

The Transport and Logistics industry in Tasmania is broad and diverse. The industry encompasses the following key sectors:

- Road Transport
- Logistics
- Warehousing
- Rail
- Maritime
- Aviation
- Ports
- Passenger Transport

Transport and Logistics roles and occupations are also embedded within supply chains and other industries including tourism, retail, construction, forestry, manufacturing and agriculture.

The key scope of this plan relates to Australian New Zealand Standard Industry Classification (ANZSIC) **Division I – Transport, Postal and Warehousing**. This Division includes providing transportation of passengers and freight by road, rail, water or air. Other transportation activities such as postal services, pipeline transport and scenic and sightseeing transport are included in this division. Goods warehousing and storage activities are also included, as is providing support services for the transportation of passengers and freight. These activities include stevedoring services, harbour services, navigation services, airport operations and customs agency services.

This Division is further categorised into the following sub-divisions -

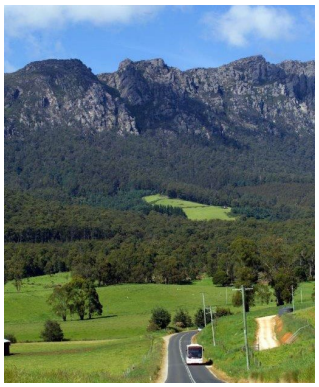
- 46 — Road Transport
- 47 — Rail Transport
- 48 — Water Transport
- 49 — Air and Space Transport
- 50 — Other Transport
- 51 — Postal and Courier Pick-up and Delivery Services
- 52 — Transport Support Services
- 53 — Warehousing and Storage Services

A brief discussion and description of the scope of each of these sub-divisions is provided. Priorities and challenges for workforce development common across industry sectors include an aging workforce, lack of diversity, uptake of technology, and priorities to improve how the industry is perceived by young people and the community in general.

At a sector level, there are unique challenges associated with specific freight characteristics, specific regulatory and compliance regimes, job roles, career pathways and traditional training provider relationships.

This Workforce Plan concentrates on challenges and priorities that are largely common across sectors of the industry. Additional work is required to establish sector specific plans to summarise the key challenges unique to individual sectors and propose sector specific responses.

Road Transport



Road Transport includes Road Freight Transport and Road Passenger Transport.

Road Freight Transport is the transportation of freight by road. It also includes renting trucks with drivers for road freight transport and road vehicle towing services.

Primary Activities of Road Transport include furniture removals, log haulage (road), road freight, road vehicle towing, taxi truck services, truck hire services. Road Freight is the largest division of businesses in Transport industry in Tasmania and operates across a range of sub-sectors across the state, including general freight, livestock, refrigerated, dangerous goods, milk, oversize/overmass, primary produce, forestry, civil construction, aquaculture.

Road transport dominates the Australian market for non-bulk freight due to its advantages in price, speed, convenience and reliability. The long-term outlook for this sector is positive, however, the industry is expected to struggle to maintain profitability as it faces growing cost pressures, skills shortages and fluctuations in fuel price.

Road transport is a key sector of the supply chain for all components of our traditional economy.

Most mid-tier road operators will continue to find trading conditions difficult as they struggle to provide a point of differentiation to their customers. They are often unable to compete on price with smaller single-truck operators and on customer service with larger more sophisticated operators. As such, they become price takers and are generally relegated to sub-contractor status.

At the small end of the market, there are generally low barriers to entry, leading to constant competition from many under-capitalised and inexperienced operators.

Niche operators generally are better placed to achieve higher margins than general freight carriers. However, niche operators closely aligned to declining industries are exposed to financial risks if they are unable to redeploy assets (i.e. specialised assets). Businesses with multi-modal capability and scale are becoming favoured.

Road Passenger Transport includes interurban and rural bus transport, urban bus transport and taxi & other road transport services. This plan includes passenger transport through bus services but does not address specific needs of the taxi sector.

The passenger transport sector of the industry consists of taxi companies (almost all single operators) and companies responsible for regular passengers (urban services and route passenger services), student-only services (services and free to user school bus services), tour and charter services, private and luxury hire car services.

Rail Transport

Rail Transport includes Rail Freight Transport and Rail Passenger Transport, however as this classification does not include tourism rail, and there are no other rail passenger transport operators in Tasmania, for the purposes of this Plan, this class relates to Rail Freight only.

Rail Freight Transport is operating railways for the transportation of freight by rail and includes rail freight transport services and suburban rail freight services.

Water Transport

Water Transport includes Water Freight Transport and Water Passenger Transport.

As an Island state, Tasmania has a strong reliance on freight connections across Bass Strait, particularly shipping services. Water Freight Transport is the operation of vessels for the transportation of freight or cargo by water. P

rimary activities of this class include coastal se freight transport services between domestic ports, freight ferry services, harbour freight transport services, international sea freight transport services between domestic and international ports, river freight transport services, ship freight management services (ie, operation of ships on behalf of owners), and water (river, sea and lake) freight transport services.

Water passenger Transport consists of the operation of vessels for the transportation of passengers by water and includes boat charter, lease or rental with crew for passenger transport, ferry operation – including vehicular, passenger ferry services, passenger ship management services (ie operation of ships on behalf of owners), ship charter, lease or rental, with crew, for passenger transport, water passenger transport services and water taxi services.

Air and Space Transport

Air and Space Transport is the operation of aircraft for the transportation of freight and passengers. Primary activities include air freight transport services and air passenger transport services, aircraft charter, lease or rental – with crew – for freight and or passengers.

Other Transport

Other Transport includes Scenic and Sightseeing transport, Pipeline and Other Transport.

Scenic and Sightseeing transport is the operation of transportation equipment for scenic and sightseeing activities. This form of transport is distinguished from transit passenger services, as the emphasis is not on the efficiency or speed of the transport service but rather on providing recreation and entertainment. The service provided is usually local in nature and generally includes tour commentary, highlighting features of the scenery and or the vehicle. Examples include operation of scenic railways, helicopter rides, fishing and whale watching cruises.

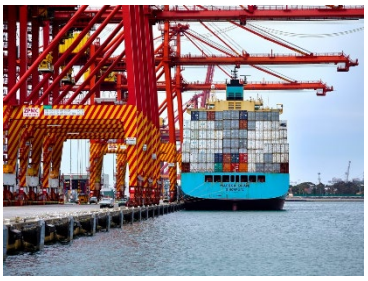
Pipeline transport is the transportation of natural gas, oil or other materials via pipelines. Other Transport is any other activity engaged in passenger and freight transportation that is not classified elsewhere, for example over snow transport operation, ski lift and ski tow operation.

Postal and Courier Pick Up and Delivery Services

Postal Services is engaged in the pick up and delivery of letters, documents and parcels (usually weighing less than 30kgs). Rather then being picked up from the sender's location, the pick up activity is from pre-determined collection points (eg post offices and postal agencies). Also included is the operation / provision of predetermined collection points (such as post offices or postal agents). Main activities include mail serviced, mailbox rental service, post office operation, postal agency operation.

Courier Pick Up and Delivery Services is the door to door pick up (ie, from the customer's residence or place of business), transport and delivery of letters, documents, parcels and other items weighing less than 30 kgs. The main activities include customised express pick up and delivery services, grocery delivery services, home delivery services, messenger services an pick up and delivery services not classified elsewhere.

Transport Support Services



Transport Support Services includes Water Transport Support Services, Airport Operations and Other Air Transport Support Services, and Other Transport Support Services.

Water Transport Support Services is further divided to the subsections of Stevedoring (loading and unloading of vessels/ships), Port and Water Transport Terminal Operations (maintenance and leasing of port facilities to facilitate the land-se a transition of goods and passengers, operation of ship mooring facilities, water transport terminals for passengers or freight, sea container terminals, wharf operations, and coal or grain loaders), and Other Water Transport Services (lighterage service, navigation service, pilotage, salvage, ship registration and agency, towboat and tugboat operations, water vessel towing).

Airport Operations and Other Air Transport Support Services is the operation of international, national or civil airports and other services to air transport such as airport terminals, runways, air traffic control, aerospace navigation, baggage handling.

Other Transport Services includes Customs Agency Services (providing advice on import and export procedures, documentation – customs agency service, customs clearance services, Export and Import documentation preparation services), Freight Forwarding Services and other Transport Support Services not elsewhere classified.

Warehousing and Storage Services

Transport Support Services includes Grain Storage and Warehousing and Storage Services.

Grain Storage services store cereal grains and primary activities include grain elevator and silo operation and storage of grain.

Warehousing and Storage services primary activities include bond store operation, bulk petroleum storage, cool room storage, controlled atmosphere stores, free store operation (storage of goods not under bond), furniture storage, refrigerated storage, wool storage and storage & warehousing not classified elsewhere.

Significance to Tasmania

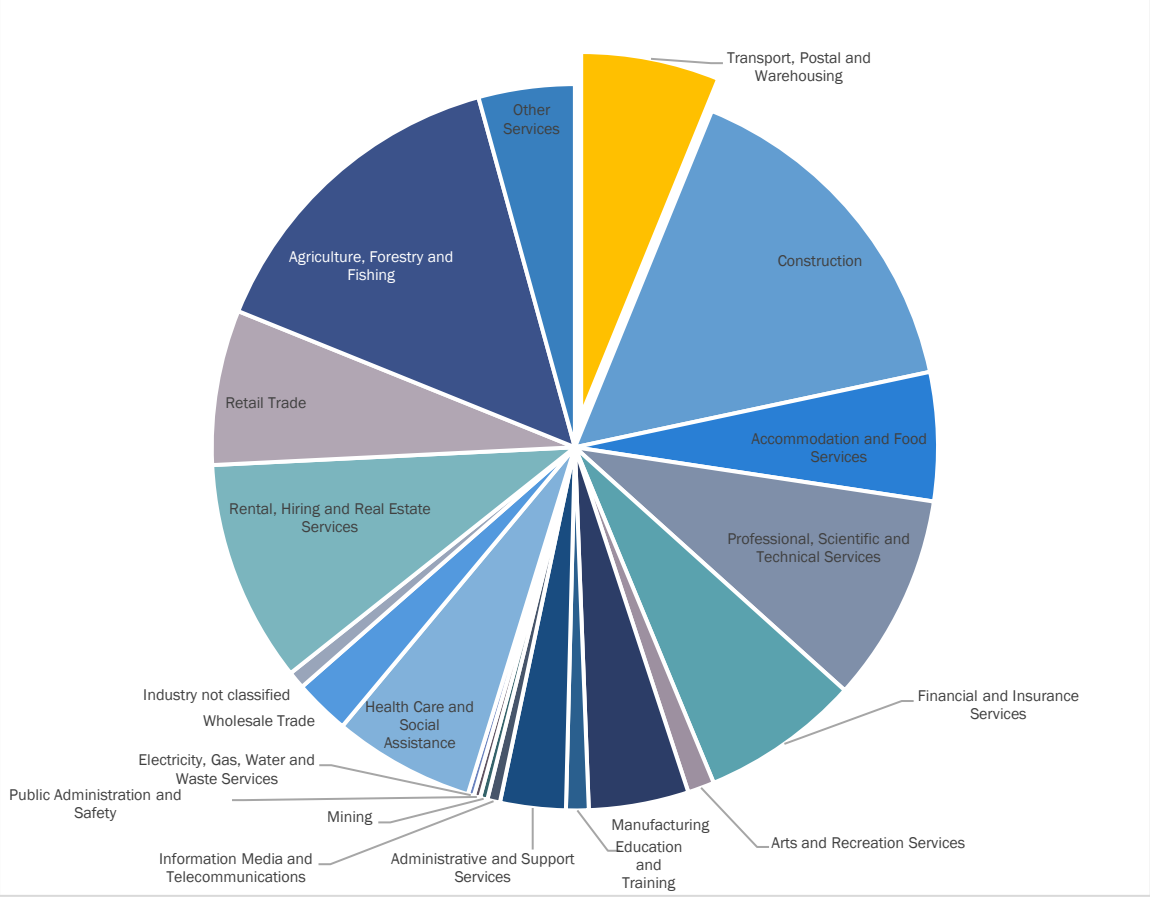
Transport and logistics is critical to the Tasmanian economy and to Tasmania's industries and businesses. Without an efficient transport sector, there is a lag on the economy, and barriers to Tasmanian industry realising potential benefits from growth.

"Tasmania's freight system and supporting infrastructure underpin business and economic growth in the state. Our economy remains one of the fastest growing in Australia and the transport sector plays a key role in facilitating this growth. Key sectors such as agriculture, advanced manufacturing, construction, and tourism and hospitality all rely on the transport sector to support their continued growth."[6]

Tasmanian Businesses

State Growth Tasmania, Economic Profile[7] reports that the Tasmanian Transport, Postal and Warehousing sector is made up of 2352 businesses (2018), the 8th largest industry grouping in Tasmania.

Figure 1 - Tasmanian Industry Sectors by Number of Registered Businesses



[6] Minister's Message, Tasmanian Transport 2019, Tasmanian Transport Association

[7] idCommunity demographic resources, State Growth Tasmania economic profile, Businesses by Industry reports, accessed at: https://economy.id.com.au/tasmania/number-of-businesses-by-industry?BType=600

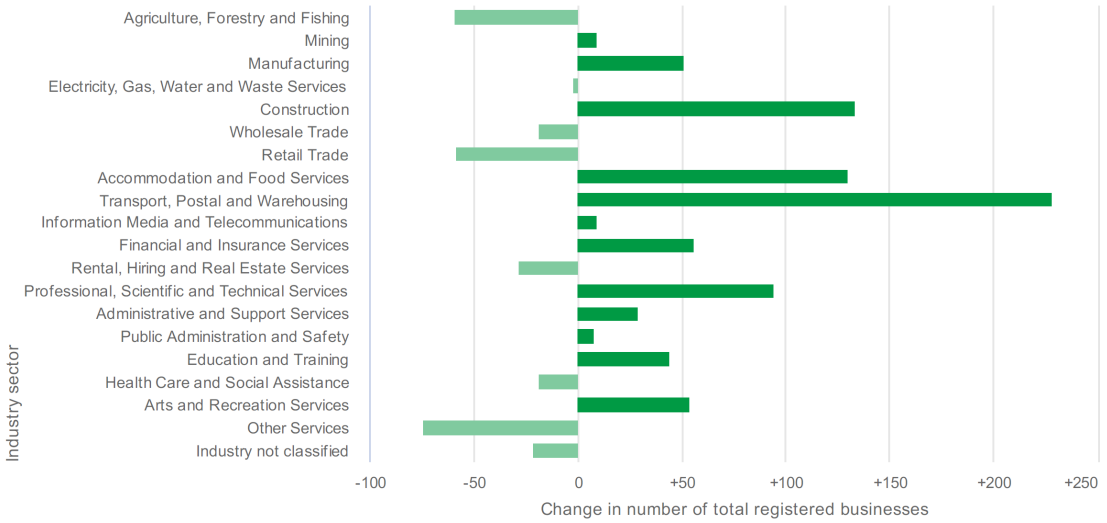
Businesses numbers in the industry have increased from 2017 – 2018 by 228, the greatest increase in registered business numbers of any industry in Tasmania.[8]

Figure 2 - Registered Businesses by Industry Tasmania

REGISTERED BUSINESSES BY INDUSTRY - TASMANIA							
Tasmania - Total registered businesses			2018			2017	Change
Industry	Number	%	Tasmania %	Number	%	Tasmania %	2017 to 2018
Transport, Postal and Warehousing	2,352	6.2	6.1	2,124	5.6	5.6	+228
Construction	5,924	15.5	15.5	5,791	15.4	15.3	+133
Accommodation and Food Services	2,185	5.7	5.7	2,055	5.5	5.5	+130
Professional, Scientific and Technical Services	3,544	9.3	9.3	3,450	9.2	9.2	+94
Financial and Insurance Services	2,708	7.1	7.1	2,652	7.0	7.1	+56
Arts and Recreation Services	453	1.2	1.2	399	1.1	1.1	+54
Manufacturing	1,698	4.4	4.4	1,647	4.4	4.4	+51
Education and Training	384	1.0	1.0	340	0.9	0.9	+44
Administrative and Support Services	1,115	2.9	2.9	1,086	2.9	2.9	+29
Information Media and Telecommunications	216	0.6	0.6	207	0.6	0.6	+9
Mining	126	0.3	0.4	117	0.3	0.3	+9
Public Administration and Safety	108	0.3	0.3	100	0.3	0.3	+8
Electricity, Gas, Water and Waste Services	104	0.3	0.3	106	0.3	0.3	-2
Health Care and Social Assistance	2,405	6.3	6.3	2,423	6.4	6.4	-18
Wholesale Trade	945	2.5	2.5	963	2.6	2.6	-18
Industry not classified	298	0.8	0.8	319	0.8	0.9	-21
Rental, Hiring and Real Estate Services	3,783	9.9	9.9	3,811	10.1	10.1	-28
Retail Trade	2,634	6.9	6.9	2,692	7.2	7.1	-58
Agriculture, Forestry and Fishing	5,578	14.6	14.6	5,637	15.0	15.0	-59
Other Services	1,635	4.3	4.3	1,709	4.5	4.5	-74
Total business	38,195	100.0	100.0	37,628	100.0	100.0	+567

Note: Non-employing businesses includes sole proprietors where the proprietor does not receive a wage or salary separate to the business income.

Figure 3 - Change in registered businesses by Industry - Tasmania - 2017 to 2018

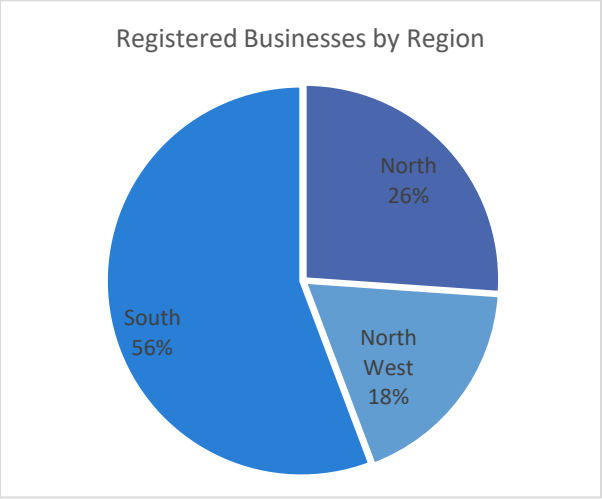


Nationally in 2018 – 19, this industry accounted for 21.6% of total annual growth in businesses. More than 90% of new business entries were of non-employing entities. The three-year survival rate of new business entries in the industry nationally is just 45.7%, reflective of the low barrier to entry in a highly competitive and cost sensitive market and a complex regulatory environment.

[8] Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits, 2016 to 2018 Cat. No. 8165.0; accessed at: https://www.abs.gov.au/AUSSTATS/abs@.nsf/allprimarymainfeatures/85372091B76BD119CA257B710014993B?opendocument

Total business distribution across the state shows a concentration on the South, followed by the North West and then the North.

Figure 4 - Transport Industry Distribution of Businesses by Region

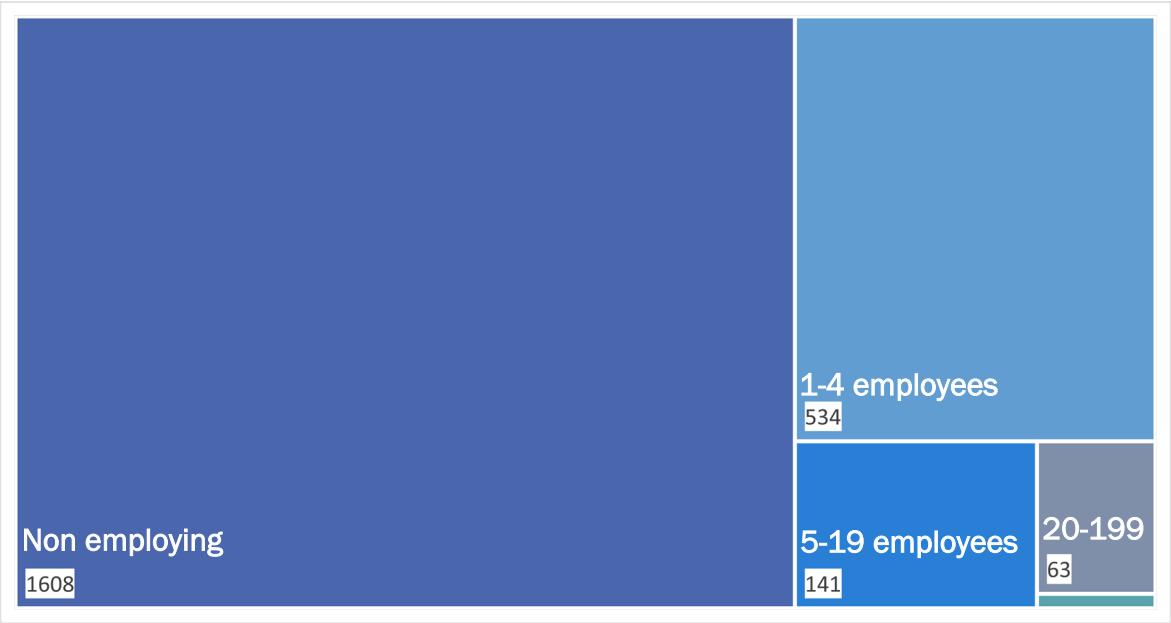


Industry Employment

The Tasmanian Transport, Postal and Warehousing industry directly employs 10,540 people (2017/18), with almost half of these (5,092) engaged in the Road Transport sector.[9]

Two thirds of the businesses in the industry are non-employing, with 1608 businesses operating as owner-operators and only 210 employing more than 5 people (including 6 employing more than 200).

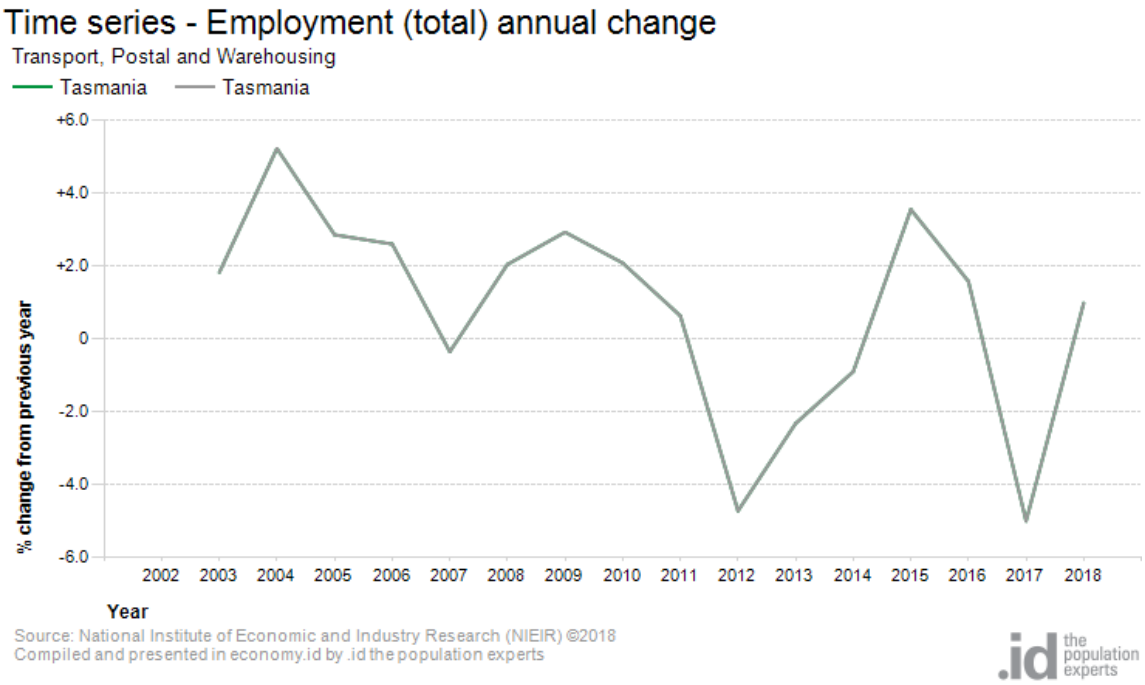
Figure 5 - Number of Employees by Registered Business - Tas Transport & Logistics Industry



Industry employment has increased from 2017 to 2018 by around 1%, after decreasing from 2015 to 2017.

[9] idCommunity demographic resources, State Growth Tasmania economic profile, Industry Sector Analysis, accessed at: https://economy.id.com.au/tasmania/industry-sector-analysis?IndkeyNieir=23801&sEndYear=2016&BType=600

Figure 6 - Employment in Transport, Postal and Warehousing - Tasmania



Although road transport is the single largest source of transportation work in Tasmania, secondary and support services functions are increasingly important in total transportation work.

Total employment across the industry is concentrated in the South (48%), followed by the North-West (27%) and North (25%), although distribution by industry sector varies depending on location of and relationship to infrastructure such as ports and rail.

An Ageing Workforce

According to the AIS Skills Forecast, 'the average age of all workers (nationally) in the Transport and Logistics industry is 45, which has increased by two years since 2006. Individual occupations within the industry have variation from this figure. For example, the average age of truck drivers in Australia is 47, while the average age of bus and coach drivers is 57'[10].

Tasmania's Transport, Postal and Warehousing industry has the highest percentage of the workforce aged over 45 years when compared to all other industries in Tasmania. The chart following shows that 59.7% of the Transport, Postal and Warehousing Industry in Tasmania is aged 45 years and older.[11]

Figure 7 - Ageing Workforce by Industry Sector - Tasmania

Table 3. Ageing workforce by industry sector, proportion and number aged 45 and over, 2016

Source: ABS Census of Population and Housing, 2016; author calculations

	45 years and older	
Industry Sector	%	No.
Transport, Postal and Warehousing	59.7	5,473
Health Care and Social Assistance	54.6	16,750
Education and Training	54.4	10,931
Rental, Hiring and Real Estate Services	53.5	1,430
Public Administration and Safety	52.9	8,971
Agriculture, Forestry and Fishing	52.8	6,014
Administrative and Support Services	49.9	3,201
Wholesale Trade	48.9	2,375
Electricity, Gas, Water and Waste Services	48.7	1,719
Mining	47.3	1,044
Manufacturing	47.2	7,016
Professional, Scientific and Technical Services	46.5	4,744
Other Services	43.2	3,499
Information Media and Telecommunications	42.2	1,227
Construction	42.1	6,924
Arts and Recreation Services	41.6	1,672
Financial and Insurance Services	41.5	1,892
Retail Trade	35.1	8,277
Accommodation and Food Services	25.7	4,252

Workforce Diversity

Although the Transport and Logistics industry consists of widely diverse businesses and a diverse range of employment opportunities, this is not necessarily reflected in diversity of the workforce.

Workforce diversity helps promote cultural inclusiveness and has a positive effect on the workforce. The Australian Trucking Association and industry partner Teletrac Navman has recognised the need to improve industry diversity in the road transport sector and has launched the Teletrac Navman Driving Change Diversity Program. The Tasmanian Transport Association initiated an annual award to recognise industry initiatives and programs for workforce diversity, proudly sponsored by TasRail.

[10] AIS Skills Forecast 2018

[11] Institute Insights #2, The Tasmanian Workforce by Industry Sector, University of Tasmania – Institute for the Study of Social Change, accessed at https://www.utas.edu.au/__data/assets/pdf_file/0016/1055005/Insight-Two.pdf

Occupations within the Transport and Logistics industry are primarily classified as 'male dominated' and industry images and messaging is characterised by a male, middle-aged truck driver. This increases the challenge for industry to improve workforce diversity.

The Tasmanian Transport Industry recognises the importance of creating an environment which encourages female participation in non-traditional roles, particularly driving roles.

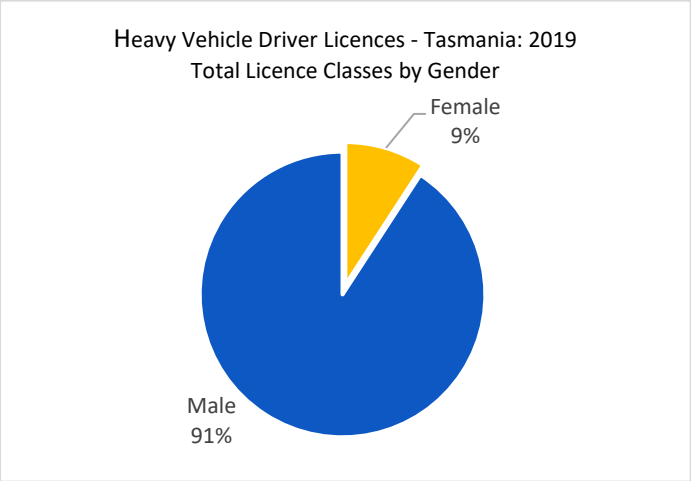
The Transport and Logistics Industry Skills Council 2015 E-Scan[12] suggests that around 4% of truck driving roles in Australia are occupied by women. In the rail sector, TasRail has

Data from the Department of State Growth Registration and Licensing area indicates that the proportion of women with heavy vehicle driver licenses in Tasmania is around 9%.

In 2016, the TTA conducted a project – Women in Transport Tasmania, including the Women behind the Wheel program, which explored the barriers and strategies for increased participation by women in non-traditional roles in the Tasmanian Transport and Logistics Industry.

The final report on this project[13] identifies strategies to be used in development of industry material to support attraction, recruitment, development and retention of women in non-traditional roles in the industry.

Figure 8 - Heavy Vehicle Driver Licences by Gender - Tasmania, 2019



Health and Wellbeing

In August 2018, Monash University released a report from a 12-year study of the health and wellbeing of Australia's truck drivers. The findings of this report are alarming: truck drivers in Australia have a 13-fold higher risk of dying at work than other Australian workers, making it one of the most dangerous occupations in Australia. Three quarters of work-related deaths for truck drivers were due to vehicle crashes. Truck driving is the most common occupation for male Australians, employing one in every thirty-three male workers in the nation.[14]

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[12] Transport and Logistics Industry Skills Council, Environmental Scan, 2015

[13] Women in Transport Tasmania – Final Report, Tasmanian Transport Association, accessed at: https://www.skills.tas.gov.au/__data/assets/pdf_file/0004/147631/Women_in_Transport_Tasmania_Report.pdf

[14] Monash study finds truck driving among Australia's most dangerous jobs, Monash University News and Events, accessed at https://www.monash.edu/medicine/news/latest/2018-articles/monash-study-most-dangerous-job, 24/09/2018

Transport, Postal and Warehousing accounts for the second highest number of fatalities amongst all industries in Tasmania, reporting 27% of all work-related fatalities in the last 10 years. Of the 24 work related fatalities in the past 10 years in Tasmania in Transport, Postal and Warehousing, all except five were the result of vehicle accidents (including 3 pedestrian deaths).[15]

WorkSafe Tasmania's Transport, Postal and Warehousing Industry Snapshot reports on performance in the 2017 year and reports:

- 324 injuries across the industry in 2017
- 55 – 64 year olds report the highest serious injury frequency rates
- 56% of serious injuries were reported by Road Freight Transport Workers
- Occupations with the highest percentage of serious injuries were truck drivers, automobile/bus and rail drivers and Delivery Drivers.
- The most common causes of injury across the industry were body stressing, falls, slips and trips, being hit by moving objects, vehicle incidents and other
- Body stressing, and being hit by moving objects, as injury mechanisms have increased as a proportion of all serious injuries in the industry in recent years.

Transport, Postal and Warehousing is an identified priority industry for attention and engagement with WorkSafe Tasmania. Priority areas for focus on the most common causes of injury across the industry.

It is important that effective and industry relevant training is available to industry to support improvements in injury rates. Examples include manual handling training as part of recruitment, development and retention programs within the industry.

Programs to support an increased understanding of safety management systems and to develop confidence and strategies for managing risk are also important considerations in workforce planning.

[15] Worksafe Tasmania – Transport, Postal and Warehousing Industry Snapshot – 2017 Performance, accessed at: https://worksafe.tas.gov.au/__data/assets/pdf_file/0005/541436/transport-industry-report.pdf

Industry challenges and opportunities

The Transport and Logistics industry is poised for dramatic change in the approaching decades, but without some decisive industry action in the next 3-5 years, productivity, business sustainability, and capacity to provide services are at risk.

The transport industry's capacity to attract, recruit, develop and retain this workforce for the future is impacted significantly by the nature of the industry and the conditions under which the industry operates.

Consultations with industry identified the following industry context issues:

- tensions between low barriers to entry vs increased safety and compliance expectations and complexity
- a short-term approach to skills gaps, attempting to 'plug the skills gap' with the same people or same cohort without expanding the talent pool, with a high level of competition between businesses
- loss of momentum for implementing programs that would help with attracting new entrants (Careers on the Move and Women Behind the Wheel)
- Limited sharing of information, knowledge and resources between businesses and sectors, particularly around the areas of training, recruitment, and compliance
- limited adoption of technology, and onboarding for workers can be overwhelming. Supporting workers to develop the skills to adapt and apply emerging technology is also disruptive to business
- existing issues with resistance to change and high levels of competition with low margins in many industry sectors.

Externally, there are three trends that are driving change and shaping the sector over the medium to long term.

These 'big picture' challenges influence all operators in the local industry, with consultations noting issues relating to:

1. Industry growth opportunities
2. Compliance and skills
3. Technological change and digital disruption

Industry Growth Opportunities

The Transport and Logistics Industry is part of a broader Tasmanian supply chain interfacing with key industries of tourism, agriculture, aquaculture, mining, and retail.

The overall demand for transportation services has grown with employment in the occupations of drivers, trainers, and managers experiencing greatest demand. The rapid ageing profile of the current workforce poses both a challenge and an opportunity to the industry, with the need to 'grow the workforce to grow the industry'.

Transport and Logistics industry growth and job growth opportunities are strongly linked. Each sector in transport and logistics plays differing roles in supporting the economy. A growing consumer demand is driving many of the pressures being experienced. Transport and Logistics does not exist without cross-sector interaction, and supply chain interactions are growing.

According to one future assessment " Australia's freight task is projected to increase by 80 percent in the lead up to 2030 and by 2050 we can expect to see freight triple". [16]

Tasmania has projected an increase in the land-freight task from 23 million tonnes in 2011-2012, to 38 million tonnes by 2035. [17] Most of this increase will be assumed by road, with 82% of net tonne kilometres currently by road.

The *Tasmanian Integrated Freight Strategy*, outlines the Tasmanian Governments' policy positions and actions in the following key areas -

- Supporting competition and service choice across Bass Strait and beyond
- Efficient freight gateways
- High-standard, responsive land freight connections
- Delivering a single, integrated freight system.

'Development of the Strategy has been led by Infrastructure Tasmania. It has focused on delivering a contemporary framework that links freight demand and investment, integrates planning and investment across modes, prioritises freight assets and supports improved project evaluation and freight system information.'

Delivering on these actions requires a strong and healthy Transport and Logistics industry. The required workforce to meet this plan will need careful and strategic development and management by industry and sets the strategic context of this report.

Figure 9 - Growth and related Workforce Opportunities

SECTOR	Road and Rail	Sea and Ports	Aviation
	Increased demand in Transport and Logistics across sectors		
Current	Land transport task was almost 23 million tonnes. (2011-2012)[18] Extensive road and rail freight network: all major freight corridors operating as parallel road and rail networks.	Over 99% of freight by volume, leaving and arriving in Tasmania, is transported by sea.[19]	Provides access to niche and overseas markets Provides fastest service to perishable high-end producers
Expected growth	Projected increase to 38 million tonnes by 2035[20]	Increasing demand for fresh and perishable products and the need for 'speed to market'	Increased speed to market for supermarket shelf ready products
Workforce Opportunities	Opportunities for new entrants into the industry at all occupational levels Increased focus on people with customer service skills Increased focus on people with technology skills Cross-sector movement opportunities Opportunity for existing workforce to cross-skill and increase capability		

[16] Transport 2050: Lookout! Here comes the future, Ferrier Hodgson, accessed at: https://www.ferrierhodgson.com/au/-/media/ferrier/files/documents/publications/transport-and-logistics/2017/lookout-here-comes-the-future.pdf

[17] Land Freight Infrastructure, Information Paper 4, Tasmanian Department of State Growth, accessed at: https://www.stategrowth.tas.gov.au/__data/assets/pdf_file/0013/134212/Information_Paper_4_-_Land_freight_infrastructure.pdf

[18] ibid

[19] ibid

[20] ibid

Compliance and Skills

Changes to the regulatory environments in Transport and Logistics directly impact the capability profile requirements of the workforce.

Industry across all sectors is responding to formal (regulatory) and community based expectations for change in environmental standards, safety of workers and public risk.

Businesses must constantly upskill and retrain workers to meet these requirements. Consequently, the skills required by the workforce will need to keep pace with any future developments.

Technological Changes and Digital Disruption

The accelerated pace of innovation and technology is directly impacting on the industry. Changes are evident with advances in engines, propulsion systems, driving and navigation, access, logistics, and data and information management. Digital disruption is also evident in the nature of work and challenges associated with digital work platforms and the emergence of the on-demand or "gig" economy.

Whole new tasks and occupations arise to support these changes with new technology skills required for an emerging workforce.

Further, choice in emerging technologies with poor integration between applications increases the complexity of skills needs for the workforce.

The current Tasmanian workforce remains vulnerable to change with regard to understanding how technology is used in their daily work, learning new applications, and using technology to improve business operations. Technology skills have been identified as a 'skill of need' within the industry priorities.

Larger operators are starting to invest more in safety and technology with a perception that these may offer a competitive advantage. Consolidation of the industry is an ongoing concern for smaller operators as customers favour the large operators more and more while the mid-tier struggle to remain competitive.

Promoting the industry and the technological advances to young people is essential to assist in reducing the age-gap within the industry. Additionally, it was noted that while advances in technology have arguably increased employment opportunities for women, barriers still exist for certain job roles considered too dangerous or impractical for females.[21]

'As technology embeds itself into the industry further, opportunities for both genders to have stable careers in the industry at any level will increase. Initiatives to make roles more flexible and attractive to sections of the broader community not traditionally engaged in the Transport and Logistics workforce would be highly beneficial for the longevity and sustainability of the industry workforce.' [22]

Challenges for industry associated with the accelerated pace of change in technology and increased automation were explored and reported in "The Future of Transportation Work: Technology, Work Organisation and the Quality of Jobs", published in 2018. This report finds:

"Workers in all parts of the economy are confronting twin threats from accelerating changes in technology and automation, and the ongoing shift toward more precarious and irregular forms of work -- including "gigs" on digital platforms. The transportation sector is widely acknowledged to be one of the most susceptible to both of these trends."[23]

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[21] AIS Skills Forecast 2018

[22] AIS Skills Forecast 2018

[23] The Future of Transportation Work: Technology, Work Organisation and the Quality of Jobs, Jim Stanford and Matt Grudnoff, Centre for Future work at the Australia Institute, accessed at: https://d3n8a8pro7vhmx.cloudfront.net/theausinstitute/pages/2690/attachments/original/1519356933/TWU_SUPER_Report_For_Posting.pdf?1519356933

The report examines the impact of automation in transportation work, including occupations and functions susceptible to computerisation and automation, stating:

"transportation is one of the industries most vulnerable to labour-saving or labour-replacing automation and computerisation. The expanded application of programming and computerisation to tasks involving judgment and responses to uncertain environments, seems inherently relevant for many transportation-related occupations – including driving, of course, but other transportation-related functions as well".

The report examines the scale and likelihood of computerisation and automation in the industry including the 'pre-requisites and barriers that must be negotiated before we see the widespread use of many of those technologies in real life applications" and concludes:

"There is no disagreement that dramatic technological changes in key elements of transportation work are coming, and the pure technology of those systems is advancing faster than traditional expectations. However, considerable uncertainty lingers regarding the pace and scope of real-world implementation of these innovations: including delays and barriers associated with regulation, consumer acceptance, infrastructure, capital investment, management capacity, and more. Even once these innovations are implemented in practice, an additional dimension of uncertainty exists regarding the likely scale of their impact on the quantity and nature of transportation employment. To be sure, some jobs will be replaced by technology; but a larger number will be changed by technology. Some new jobs will be created, to develop, manage, operate, and maintain new equipment and systems – and others will be created to fill new demand arising from the capacity of new technology to produce a broader range of services and functions. Still other jobs won't really be changed at all by technology."

Industry Engagement with Formal Vocational Education and Training

Engagement with formally recognised vocational education and training by Tasmanian transport and logistics businesses is slowly increasing, from a significant decrease between 2015 - 2016.

The TLI Transport and Logistics Training Package is the key qualification enabler for the transport and logistics industry and comprises 36 qualifications, 38 Skill Sets, 464 Units of Competency and associated assessment requirements covering these sectors. The TLI Training Package provides nationally recognised Vocational Education and Training (VET) qualifications for occupations involved in:

- warehousing and logistics operations
- driving operations
- stevedoring
- yard operations freight handler,
- furniture removals,
- international freight forwarding
- mobile crane operations
- waste driving operations
- driving instruction for car
- heavy vehicle and motorcycles
- materiel and deployment logistics
- traffic operations
- bus and coach operations
- customs broking

Data from the National Centre for Vocational Education Research has been used to provide a picture of how the Tasmanian industry is engaging with formal qualifications available through the endorsed transport and logistics training package. The data is rounded to the nearest 5 as a function of the NCVER data model. All data in the following charts and tables has been sourced from the NCVER Total VET students and courses 2018 data slicer, 6 September 2019 version, available from: https://www.ncver.edu.au/research-and-statistics/data/all-data/total-vet-students-and-courses-2018-data-slicer

This data is based on enrolments in full qualifications and does not include short course / unit of competency enrolments, which are a significant enabler of licensing and productivity -based accreditation programs in the industry. The data does not include participation in higher education qualifications including through the Australian Maritime College, University of Tasmania or University College.

Total Enrolments and TLI Enrolments

Nationally, new enrolments in Transport and Logistics training package qualifications made up just over 3% of total new enrolments in 2018.

In Tasmania, the representation of Transport and Logistics qualification new enrolments within total new enrolments is lower, with new enrolments in Transport and Logistics training package qualifications making up just over 2% of total new enrolments in 2018.

Figure 10 - 2018 New Enrolments in Transport and Logistics Qualifications & All Qualifications: Tasmania and National

	Tasmania	National
Total New Enrolments - all Qualifications	42020	2622520
Total New Enrolments - Transport & Logistics Qualifications	905	80585
Percentage Transport & Logistics enrolments	2.2%	3.1%

Based on Qualifications available through endorsed Transport & Logistics Training Packages, rounded

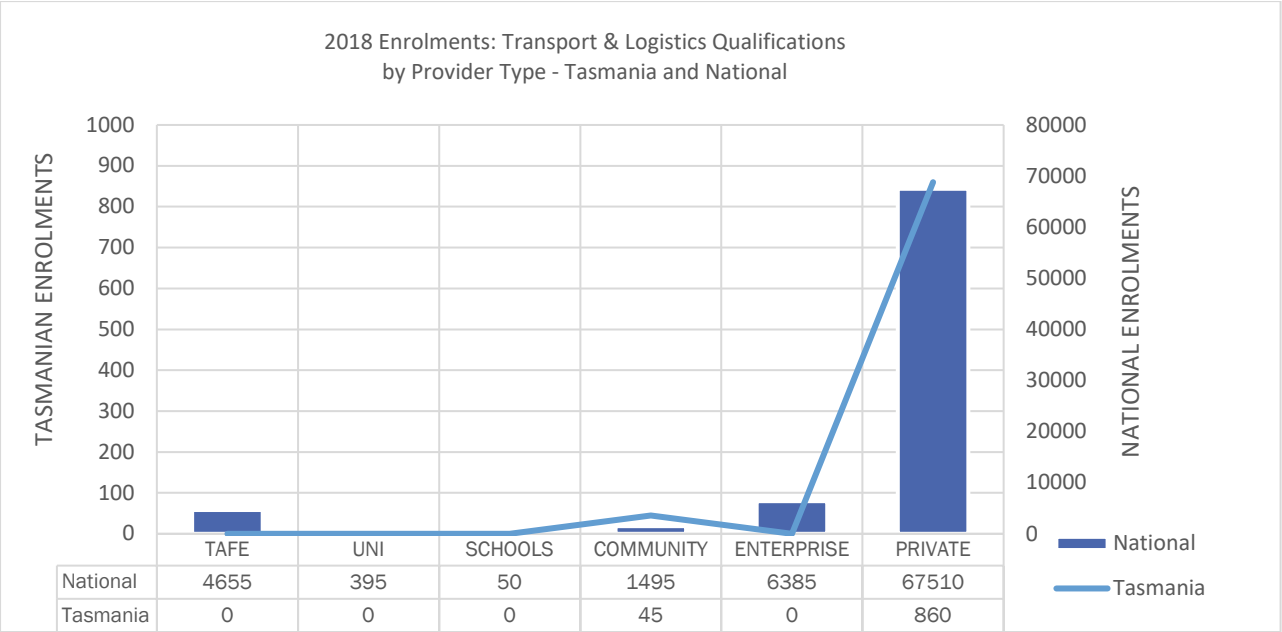
Enrolments by Provider Type

Transport and logistics qualifications are largely provided by Private Training providers, both nationally and in Tasmania.

Across all training packages nationally, TAFE was the provider for 31% new qualification enrolments in 2018, and private providers responsible for 53% of total new enrolments. In Tasmania, TAFE accounts for 46% of total new enrolments in 2018, and private training providers 42%.

In Transport and Logistics qualifications in 2018, TAFE nationally accounted for 6%, with private providers accounting for 84% of new enrolments. In Tasmania, private training providers account for 95% of new enrolments in 2018 in Transport and Logistics qualifications, with no new enrolments in 2018 attributable to TAFE.

Figure 11 - 2018 New Enrolments in Transport & Logistics, by Provider Type, National and Tasmania

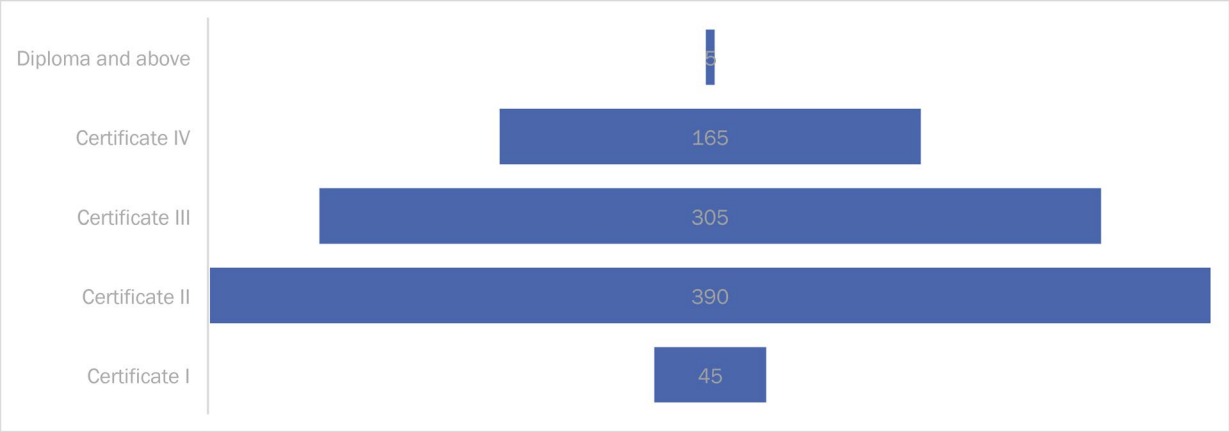


	TAFE	UNI	SCHOOLS	COMMUNITY	ENTERPRISE	PRIVATE
National	4655	395	50	1495	6385	67510
Tasmania	0	0	0	45	0	860

Enrolments by Qualification level

New enrolments in Transport & Logistics training package qualifications in 2018 are concentrated in the Certificate II and Certificate III levels, with Certificate IV the next highest level represented. This is consistent with the workforce using these qualifications as entry points and supporting the existing workforce.

Figure 12 – New enrolments in TLI Qualifications by Qualification Level - Tasmania - 2018



Enrolments by Qualification

Most enrolments in Tasmania are in the Driving Operations and Warehousing Operations streams of the training package. There has been a decrease in enrolments in the Certificate III and Certificate IV in Logistics since 2017 – 2018, reflecting industry's challenge accessing a suitable training provider for this qualification pathway.

Figure 13 - Enrolments in TLI / TDT Training Package Qualifications – Tasmania – by qualification, year and provider type

QUALIFICATION NAME	Provider type				
	TAFE institutes	Community education providers		Private training providers	
	2017	2017	2018	2017	2018
TLI11210 - Certificate I in Warehousing Operations	0	15	0	0	0
TLI11215 - Certificate I in Warehousing Operations	0	35	45	0	0
TOTAL CERTIFICATE I ENROLMENTS	0	50	45	0	0
TLI21210 - Certificate II in Driving Operations	0	0	0	180	305
TLI21216 - Certificate II in Driving Operations	0	0	0	20	0
TLI21311 - Certificate II in Rail Infrastructure	0	0	0	0	0
TLI21315 - Certificate II in Rail Infrastructure	0	0	0	25	20
TLI21610 - Certificate II in Warehousing Operations	0	35	0	15	0
TLI21616 - Certificate II in Warehousing Operations	0	0	0	95	55
TLI21716 - Certificate II in Road Transport Yard Operations (Freight Handler)	0	0	0	0	0
TLI22013 - Certificate II in Shunting	0	0	0	0	0
TLI22015 - Certificate II in Shunting	0	0	0	15	10
TOTAL CERTIFICATE II ENROLMENTS	0	35	0	350	390
TLI31210 - Certificate III in Driving Operations	0	0	0	30	0
TLI31216 - Certificate III in Driving Operations	0	0	0	70	120
TLI31610 - Certificate III in Warehousing Operations	0	0	0	45	10
TLI31616 - Certificate III in Warehousing Operations	0	0	0	100	110
TLI32410 - Certificate III in Logistics	0	0	0	35	0
TLI32416 - Certificate III in Logistics	0	0	0	30	20
TLI32515 - Certificate III in Rail Infrastructure	0	0	0	10	5
TLI33215 - Certificate III in Terminal Train Driving	0	0	0	0	0
TLI33313 - Certificate III in Furniture Removal	0	0	0	5	0
TLI33316 - Certificate III in Furniture Removal	0	0	0	0	15
TLI33413 - Certificate III in Waste Driving Operations	0	0	0	15	0
TLI33416 - Certificate III in Waste Driving Operations	0	0	0	25	25
TLI33513 - Certificate III in Stevedoring	25	0	0	0	0
TOTAL CERTIFICATE III ENROLMENTS	25	0	0	365	305
TLI41216 - Certificate IV in Transport and Logistics (Road Transport - Car Driving Instruction)	0	0	0	0	10
TLI41810 - Certificate IV in Warehousing Operations	0	0	0	0	0
TLI41816 - Certificate IV in Warehousing Operations	0	0	0	0	0
TLI42010 - Certificate IV in Logistics	0	0	0	15	0
TLI42016 - Certificate IV in Logistics	0	0	0	25	35
TLI42116 - Certificate IV in Driving Operations	0	0	0	0	110
TLI42215 - Certificate IV in Rail Network Control	0	0	0	0	0
TLI42615 - Certificate IV in Train Driving	0	0	0	55	5
TOTAL CERTIFICATE IV ENROLMENTS	0	0	0	95	160
TLI50415 - Diploma of Logistics	0	0	0	5	5
TOTAL DIPLOMA ENROLMENTS	0	0	0	5	5

Industry Engagement with Cert III Qualifications

In comparison with other qualifications from parent training packages specific to other industries from the top 10 in Tasmania, Transport and Logistics has a lower than average engagement with Certificate III level qualifications. This may be due in part to a supply and demand issues with regard to RTOs and trainers, to licensing connectivity at other Certificate Levels, or state policies around funding. It may also be associated with perceived industry value around the Certificate III qualifications.

Broadly speaking, however, this low level of engagement at the Certificate III level provides further evidence that industry does not use traineeships to their full capacity.

Figure 14 - Enrolments by Industry by Provider Type

Parent Training Package for Certificate III Qualification	ENROLMENTS BY TRAINING PROVIDER TYPE		
	TAFE Institutes	Schools	Private Training Providers
Agriculture, Horticulture and Conservation and Land Management (AGF, AGR, AHC, RTD, RTE, RTF, RUA, R	300	0	60
Construction, Plumbing & Services Integrated Framework (BCF, BCG, BCP, CPC)	1375	0	300
Resources and Infrastructure (BCC, DRT, MNC, MNM, MNQ, RII)	75	0	650
Tourism, Travel and Hospitality (SIT, THH, THT)	660	70	575
Transport and Logistics (TDT, TLI)	0	0	305

There are opportunities for the industry to increase participation in the VET Sector in Tasmania, particularly at Certificate III and Certificate IV qualifications, through increased engagement with traineeships and apprenticeships.

The barriers to increased engagement include

- complexity of the language and structures of VET, including who does what and what support is available
- access to responsive and industry grounded training providers with capacity to customise the program to meet the needs of the industry and the workplace
- poor integration and articulation between licensing, compliance/productivity based training and qualification programs
- the focus on training for today, to keep up with a shifting compliance framework
- concerns around risk in formal training agreements / contracts
- level of 'pastoral care' needed to support entrants to industry with little or no experience, either with work in general, or in transport
- poor integration with business practices, systems and needs
- practice of following shifting government subsidies
- business disruption to onboard and train a person with no experience
- concerns about the reporting obligations and paperwork trail needed for formal agreements

The decision to not retain the payroll tax exemption for Young People, Trainees and Apprentices in the transport and logistics industry from 1 July 2019 has also negatively impacted industry's attraction to entering formal traineeship and apprenticeship models.

Access to training infrastructure based in Tasmania is limited. Industry has a strong reliance on the private training sector, however the number of private RTOs operating in Tasmania with Training and Logistics within Scope of Registration is dwindling.

There are 13 Registered Training Organisations with head office locations in Tasmania offering qualifications from the TLI Training Package. Capacity of these providers and the scope of qualifications offered is considered to be limited.

For example, the Certificate III in Driving Operations is a key base qualification for the road transport sector. Based on the training.gov.au website, there are only 2 RTOs with scope registered for theTLI31216 Certificate III in Driving Operations with a head office in Tasmania. Only one of these RTOs has endorsement to provide the critical heavy vehicle driver licence training and assessment services which are needed to meet core qualification requirements.

TasTAFE, the nationally recognised public provider, does not have this qualification on scope.

Industry has reported issues with reliability of service by RTOs offering this qualification in Tasmania, as fly-in / fly-out models and has expressed dissatisfaction with the quality of service received.

Most workforce development activity is located within transport enterprises and is resourced by the business.

Many regulations, productivity enabling programs and enterprise agreements in transport and logistics include specified training and assessment criteria and the onus for meeting these criteria is within the enterprise. Investment in training and workforce development activities tends to focus on short courses to meet these obligations, in the context of a highly competitive industry environment with limited workforce planning and development resources.

Fewer organisations see the benefit of committing their workforce to full / formal qualifications, with a preference of specific skills or skill sets identified as preferable across the industry.

More organisations also see the benefit or providing training in soft skills, particularly with regard to customer service, leadership, and change management. These have been identified as areas of priority for the future.

There are opportunities to integrate the compliance, productivity and enterprise based priorities for workforce development within a traineeship model. For industry to increase participation rate in formal contracts of training such as through traineeships and apprenticeships, these opportunities need to be modelled, demonstrated and communicated to industry.

Key Challenges aligned with the Workforce Planning Cycle

The full range of the transport and logistics industry potential relies on the capacity and capability of its workforce. Transport and Logistics needs people; it needs specialists, it needs diversity, and it needs young and new entrants into all sectors.

To meet increasing customer and community expectations, and maximise future opportunities, it is essential for the Transport and Logistics industry and its partners to consider the actions required to maintain the relevance and ability of its workforce.

Industry has identified challenges specific to each stage of the workforce cycle: attraction, recruitment, development and retention.

Attraction

The industry finds it difficult to attract people to work in the industry.

Key Issues

The issues identified by industry include -

- increased competition from other industry sectors for employment opportunities
- increased competition from higher education providers and greater access to higher education
- poor community understanding of the role of transport and logistics and poor industry 'image'
- low awareness of the opportunities for and range of rewarding careers in the industry – including in schools, career advisory networks, job network agencies
- lack of clearly detailed and communicated pathways in industry - although vocational and career pathways in the industry are established, these are not clearly communicated or available within industry. As a result, attracting, training and retaining workers to pursue a career in the Transport and Logistics industry is proving difficult and largely unsuccessful
- nature of work in the industry including shift work, long hours, work hours resulting in a work structure that is not considered to be 'family-friendly' and which can impact people's ability to engage in other community, sporting and social activities
- wages considered too low or uncompetitive and structures which mean wage earning employees often work extended and overtime hours to achieve rewards
- high manual handling demands in some occupations
- personal accountability for compliance and high penalties for breaches
- increasing literacy and digital literacy demands
- low workforce diversity – with the industry overall categorised as 'male dominated'

Relationship with Strategic Actions

1	Develop and implement a marketing strategy to raise awareness of the critical role of transport and logistics enabling the Tasmanian economy and community standards of living, and to promote the Tasmanian Transport Industry as a safe, technologically advanced, professional and rewarding industry to work in.
2	Develop and implement marketing materials for occupations in demand, targeting specific job seeker profiles to address issues of aging workforce, lack of diversity in workforce and to respond to areas of critical shortage in labour market supply.
4	Establish 'profiles' for key job roles in demand across industry
9	Document career path models for key occupations across industry showing clear entry points aligned with recruitment models such as Careers on the Move, Job Ready Programs, Schools based Apprenticeships, Apprenticeships, Traineeships, seasonal entry
3	Establish a networking calendar to engage Transport and Logistics Industry members with education and training providers, career advisors, job agencies, employment networks, to promote the industry and the range of careers in the industry

Recruitment

Current recruitment pathways and models to industry are not effective.

Viable recruitment strategies for succession and preparing a new cohort of workers is required to ensure industry can keep up with demand. Attracting young people needs to start earlier and a more consistent approach by industry is required. Improving the 'brand' of the industry is relevant to improving new workforce entrant numbers. The opportunity to change the profile of the industry is a strong motivator.

There is great opportunity for employment and an extensive range of rewarding careers within the Transport and Logistics Industry, however it is not seen as a 'career of choice'. A priority for industry is to promote itself as a workplace environment that is safe, diverse, sustainable, and advanced.

Key Issues

Key issues identified by industry include

- old school thinking and lack of innovation in recruitment processes
- cost, time, and inconvenience associated with attaining the required licenses, qualification/certification/skills (applies to road and bus sectors) including, for example - driver licence, passenger vehicle ancillary certificate, dangerous goods licence, driving instructor ancillary certificate, high risk work licences (forklift, EWP) and resulting high on-boarding cost to recruitment
- current reliance on 'poaching' – the unsustainable practice within industry of drawing from the existing workforce pool. There are a handful of notable exceptions, with a small number of businesses actively involved in developing new workers, at high cost to the business, only to find that these workers are then actively targeted by other businesses
- lack of awareness of how to engage with external recruitment agencies and support services
- 'start / stop' of industry recruitment models – successful models have been piloted by industry (such as Careers on the Move targeting young entrants, Job Ready programs providing a mix of formal training and workplace experience, and Women behind the Wheel – a program to recruit and develop women for non-traditional truck driving roles), but have not become mainstream due to a combination of reliance on funding cycles for subsidies and the capacity and interest of the education and training partners

Relationship with Strategic Actions

3	Establish a networking calendar to engage Transport and Logistics Industry members with education and training providers, career advisors, job agencies, employment networks, to share strategies for workforce development including attraction, recruitment, development and retention
5	Mainstream the Careers on the Move program
6	Assist industry to increase engagement with Schools based Apprenticeship pathways
7	Mainstream Job Ready programs
8	Revise and promote the "How To" Recruitment kits previously developed by TTLWAG, to provide current information, links and support for industry
11	Identify gaps in capacity or capability and support industry / education and training provider engagement and alternative strategies to resource gaps. This may include support for businesses and providers to enter formal auspice arrangements, resource sharing arrangements, developing new programs and attracting new providers to support the Tasmanian industry.
19	Establish an industry advisory service to connect industry with service providers including with apprenticeship and traineeship structures, recruitment agencies and other workforce development services
20	Develop and promote a small business workforce capability development service, to support businesses improve workforce planning and development capability

Development

Most of the training and development effort is concentrated within enterprises, with little engagement with external formal education and training providers.

Whilst there is a strong desire within industry to contribute to a vibrant and functioning Transport and Logistics industry future in Tasmania, many businesses are uncertain about the future, and whether through lack of resources or protection of 'competitive advantage / trade secrets', are reticent to collaborate on workforce development projects.

Consumer expectations are also changing, and their purchasing habits are demanding a shift in the way transport and logistics operates. Traditional logistics is moving towards 'omni-channel logistics'; being available 24 hours a day online, with multiple methods of delivery, at the convenience of the customer.

Industry reports current levels of high demand for driver skill training and education (truck and coach in particular) with a strong focus on ensuring safety and driver pathway opportunities.

Industry has indicated support for traineeships and apprenticeships under circumstances where the training system has capacity and capability to meet industry expectations.

Key Issues

The issues identified by industry include -

- limited access to local training and education providers with expertise in transport and logistics
- shortage of trainers and assessors in Transport and Logistics; both within the formal VET system and within transport enterprises
- gap in terms of a strong industry-based model for leadership / management / supervisory skills development
- high cost of on-boarding new entrants in terms of building on minimum "licensing competency" to move to operational "industry competency"; specialised equipment, cost of doubling up with supervision while a new entrant gains experience to become safe
- shifting client needs particularly with a move to increased reliance on 3PL, 4PL and even 5PL solutions
- emerging technologies across all industry operations, with opportunities for greater application and integration of a range of industry technologies – some of which are competing
- formal VET training is mainly through private RTOs, with limited offering available through the public provider (TAFE), and significant changes in the private RTO landscape over the past 3 years in Tasmania
- disengagement with formal training pathways such as traineeships, apprenticeships – associated with a lack of confidence in the capacity and capability of training providers, unreliability of access to providers, poor integration with workforce and business strategic priorities
- low awareness of structures, processes and support to engage with formal training and education

Relationship with Strategic Actions

3	Establish a networking calendar to engage Transport and Logistics Industry members with education and training providers, career advisors, job agencies, employment networks, to explore issues relevant to industry – for example, emerging technologies and their application to industry operations, changes to regulations, industry accreditation systems, industrial relations
6	Assist industry to increase engagement with Schools based Apprenticeship Pathways
10	Develop and promote a register of specific qualifications and short course requirements aligned with critical occupations for each sector of Transport and Logistics, listing training and education providers servicing this need in Tasmania.
11	Identify gaps in capacity or capability and support industry / education and training provider engagement and alternative strategies to resource gaps. This may include support for businesses and providers to enter formal auspice arrangements, resource sharing arrangements, developing new programs and attracting new providers to support the Tasmanian industry.
12	Establish and promote a leadership development program for emerging supervisors and managers across Tasmanian Transport and Logistics sectors

13	Establish a suite of resources to support industry to provide enterprise based, non-accredited training related to industry developments, safety, productivity and compliance.
14	Establish the feasibility and application for Virtual Reality/simulator resources to address issues of training gaps in driver competency and to provide a marketing tool for industry awareness.
16	Establish a training brokerage to aggregate industry requirements and facilitate training offering to meet this demand. Areas identified as in demand: ▸ Occupational licensing (including driver, dangerous goods, high risk work) ▸ Compliance (including Chain of Responsibility, WHS, IR) ▸ Technology skills ▸ Management / Operations / leadership / Supervisory / Change Management ▸ Customer service
17	Investigate feasibility of providing a group training service to stimulate apprenticeship (both trade and higher level) activity, delivered through a partnership with existing models or establishment of a new service
19	Establish an industry advisory service to connect industry with service providers including with apprenticeship and traineeship structures, recruitment agencies and other workforce development services

Retention

The rapidly aging profile of the current workforce, lack of the workforce supply chain delivering new entrants, and practices of 'poaching' within industry result in challenges for industry to retain the existing workforce.

Key Issues

The issues identified by industry include -

- increased competition from other industries for workers in the context of a growing Tasmanian economy
- an aging workforce, with a large proportion reaching retirement age in the next decade
- multi-layered regulatory environment and high personal compliance requirements, with corresponding significant penalties for roles throughout the transport industry chain of responsibility
- increasing literacy, and digital literacy demands associated with emerging technologies and compliance systems within industry

Relationship with Strategic Actions

15	Establish industry mentors within transport businesses with coaching and mentoring skills to support transfer of knowledge and development of new entrants.
21	Establish and promote links with literacy resources for industry including the Tasmanian 26TEN network.

Current critical workforce gaps

Drivers, Forklift Operators, Trainers, Assessors, Supervisors, Managers and Mechanical Trades are occupations in demand in the Tasmanian Transport and Logistics Industry.

Key jobs remain unfilled or under-skilled across the industry, including:

- Drivers (road, rail, passenger) and Forklift Operators (all sectors)
- Trainers and Assessors – within RTOs and enterprise-based
- Supervisors/Managers
- Diesel Mechanics

From a risk factor, the shortages in occupations set out above need to be addressed as a critical priority.

Drivers (Road and Rail) and Forklift Operators

To achieve high levels of safety and productivity in the context of an ever-evolving regulatory framework and increasing community expectations, industry must invest in continuous driver skill training and education.

General reasons for shortages are noted as:

- the training system for driver and forklift licensing is expensive and requires significant input from industry
- at present there are only two heavy vehicle driver licensing providers in Tasmania access to the system for heavy vehicle driver licences is not responsive to industry and has considerable wait times beyond industry expectations
- licensing "competency" does not equate to operational, industry competency and licensing is one aspect of developing a person to meet industry standards
- common industry practice is to poach skilled and licensed drivers from other operations, causing inflated demand
- inequity exists in the industry as a handful of businesses often carry the burden of developing and licensing new entrants and promoting up the line, the benefit of which is spread then across the entire industry.

Trainers and Assessors

The industry as a whole, across all sectors, lacks a suitable trainer and assessor pool to meet current and future training demands. There is a general perception that the financial reward for a trainer is less than what could be achieved by remaining in an active industry role.

General reasons for shortages are noted as:

- the entire industry lacks a suitable trainer and assessor resource to meet training demands – within enterprise and through formal vocational education and training
- trainers and assessors must hold multiple qualifications with industry specialisations and industry endorsement; eg for driving instructors, high risk work licence assessors, dangerous goods driver licence trainers
- maintaining currency for both vocational and training competency is challenging
- the pool of suitable trainers is limited
- the cost to develop a competent industry worker to a trainer is estimated at $50,000

Supervisors / Managers

Capable supervisors and managers are critical to business development, compliance and innovation. The Tasmanian industry values supervisors and managers who have an operational understanding of how the industry works and who can provide leadership to improve business practices. Lack of a dedicated / industry relevant program to develop emerging leaders is identified as a barrier to industry in Tasmania.

At a National level, the Daimler Truck & Bus Future Leaders Program was established in 2017, to provide a high calibre and finely tailored program for transport industry emerging leaders. This program is limited in scope to the road transport / trucking sector. Tasmanian industry has nominated a representative to the program in each year and participants have reported strong benefits from the program. A similar program, open across industry sectors, is identified as a potential solution for the Tasmanian industry.

Diesel Mechanics

Diesel mechanics are employed within transport businesses and within those businesses servicing the industry. All are reporting a shortage in qualified diesel mechanics. Many businesses who support an apprentice find that strong competition from the light vehicle sector means that they lose the apprentice once they meet the qualification requirements and the apprenticeship is completed.

Cross sector skills shortages

Stakeholder feedback has identified skills shortages across sectors that need to be addressed to ensure the viability of the industry. These include cross-sector skills, soft skills, and occupation skills.

Cross-sector skills	Soft Skills	Occupation skills
compliance	customer service	driving
driver experience and upskilling	leadership	forklift operations
operations	change management	training and assessing
technology	time management	
management		

Whilst cross-sector and soft skills are being addressed by transport businesses through internal resources, there is no state-wide approach to address these gaps. Industry is primarily focused on achieving high levels of safety and compliance. The required 'sustainable operating practices' and changes to regulations under the Chain of Responsibility provisions of the Heavy Vehicle National Law are beginning to influence industry decisions.

Workforce priorities – 4 key themes

There are common issues forwarded as 'challenges' faced by all Tasmanian Transport and Logistics sectors in relation to workforce development.

These challenges are divided into 4 themes of industry priority:

1. Awareness
2. Recruitment
3. Skills
4. Professionalism

Industry stakeholders identified a real sense of urgency and opportunity for workforce development including programs for action.

There was a strongly expressed desire from across industry to:

- Work collaboratively on improving the image of the industry
- To participate in networking events to promote communication of good practice and models for workforce development
- To transfer knowledge of the existing workforce to new entrants

An overview of the industry recommendations supported by feedback provided in the graphic below:

Theme 1: Awareness

Creating awareness within, and about the industry remains a priority, with key concepts that need to be communicated to government and the community at large as follows:

- TTA as a key industry information and lobbying mechanism
- Transport and logistics as integral to the continued economic growth of Tasmania
- Transport and logistics as critical to standard of living and consumer expectations
- Differing needs for sectors recognised via secondary workforce development plans
- Transport and Logistics as an attractive and viable career choice impacting the 'brand' of Tasmania

Theme 2: Recruitment

Clear industry entry points and pathways should continue to be established and existing recruitment programs should be mainstreamed ("Careers on the Move", "Job Ready" and "Women Behind the Wheel").

Efforts should be made to update and properly house Recruitment Kits to aid pathways into the industry and support the ongoing issues with recruitment.

Top priorities to address:

- Diversity
- Youth Engagement
- NEW drivers
- NEW trainers and assessors
- People wanting to change their careers and enter transport

Theme 3: Skills

Skills acquisition and enhancement are an industry wide priority and impact the sustainability of all sectors.

A snapshot of these are as follows:

- Top Priority Skills: compliance, driver experience and upskilling, operations, technology and management
- Top Priority Soft Skills: customer service, leadership, lean principles, change management
- Top Priority Occupation skills: driving, training and assessing, mechanical trades

Alternate training models should be sought to support the changing workforce demands within industry, particularly for short courses. Suites of courses are preferred over full qualifications, particularly those related to regulations or compliance.

Competency development via mentoring, to ensure skills are transferred from the existing workforce prior to 'retirement,' is seen as an alternate option to formal training. Potential to further develop mentors into trainers should be pursued to alleviate the current burden on the existing licensing system, as industry can do more of the competency development before formal, mandated licensing assessments.

Theme 4: Professionalism

Feedback indicated that there is a change to what could be considered 'professionalism' within the industry.

A range of industry accreditation schemes are in place and available within industry sectors. Some of these are designed to provide regulatory concessions and productivity benefits, while others provide a whole of business approach. In the road transport sector, a national review of industry accreditation schemes was conducted and recommended several changes to the systems including providing opportunities for mutual recognition.

Changes to the Heavy Vehicle National law may also impact models for industry accreditation.

The TTA should remain part of the national conversation regarding accreditation but could pursue other avenues for achieving professionalism and raising standards in the industry.

Areas for consideration were noted as follows:

- Cultural change to ensure that Transport and Logistics becomes a 'career of choice'
- Focus on career plans and pathways for new and existing workers
- Creating networks to communicate successes and professionalism of the industry

Methodology

Consultation with representatives of sectors within the industry and with stakeholders including education and training providers was undertaken during 2019 - 2020 to determine the priorities for workforce development in Tasmania.

The consultation process allowed industry stakeholders to share issues and address their concerns about the industry challenges and opportunities. Stakeholder feedback has provided key action items for this plan.

Consultation with stakeholders was in the form of:

1. planning and framework consultation with the TTLWAG
2. structured one on one interviews with industry, education providers and other industry stakeholders
3. industry-wide online surveys
4. workshops held in Burnie, Launceston, Devonport, Scottsdale and Hobart

Industry feedback and expertise was also sought to determine the success of the workforce plan 2015-2018.

Stakeholder Consultation List

Below is a list of those organisations / representative groups who provided input to the development of this Workforce Plan. This includes those who contributed to the evaluation of the 2015-2018 Workforce Plan, which provided strong context to the priorities to be addressed in this Workforce Plan.

STAKEHOLDERS – BY COMPANY / ORGANISATION / AGENCY	
Agility Logistics	NDA Consulting
AJL Training	OnRoad OffRoad Training
Australian Maritime College	Port of Melbourne Corporation
Boobyalla Earth Moving	Qantas Freight Enterprises
C & S Jones Transport	SeaMax Transport
Caltas / Bonney Group	SeaRoad Logistics
Chas Kelly Transport	Selwyn Sinfield – driver and industry advocate
De Bruyn's Transport	Skills Tasmania
Department of State Growth	South Fork Transport
Education Department	SRT Logistics
Fonterra Farm Milk Cartage	State Roads, Department of State Growth
Individual Drivers / past program participants	Streefland's Transport
Inspire Ag	Tas Bus Association
Kenworth Australia Driver Trainer	TasPorts
Link Logistics	TasRail
Mas Employment	Transport Workers Union
Monson Logistics	University College
National Transport Insurance	Veolia Environmental Services
National Transport Insurance	Work & Training

Bibliography

A range of reports and resources were referred to in the development of this Workforce Plan and referenced in footnotes, including:

Document Name & Source
Women in Transport Tasmania – Barriers and strategies for increased participation by women in non-traditional roles in the Tasmanian Transport & Logistics Industry https://www.skills.tas.gov.au/__data/assets/pdf_file/0004/147631/Women_in_Transport_Tasmania_Report.pdf
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