



MSA Strategic Board Sub-committee Industry Reference Committee (IRC)

MSS Sustainability Training Package

IRC Skills Forecast and Proposed Schedule of Work 2017-2021

April 2017

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Prepared on behalf of the MSA Strategic Board Sub-Committee IRC for the Australian Industry Skills Committee (AISC)

IRC Skills Forecast and Proposed Schedule of Work 2017-2021

This IRC Skills Forecast and Proposed Schedule of work 2017-2021 has been produced with the assistance of funding provided by the Commonwealth Government through the Department of Education and Training.

IBSA also acknowledges the September 2016 Four Year Work Plan, produced by Manufacturing Skills Australia (MSA), on which this version is based.



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Executive Summary

The Manufacturing Skills Australia (MSA) Strategic Board Sub Committee Industry Reference Committee Skills Forecast and Proposed Schedule of Work, links sector trends, workforce skill priorities and training plan to effectively meet the future skill needs of this sector in transition by:

- providing an understanding of the industry including its primary activities, its size and sub sectors, type and location of employers, and opportunities and challenges (*Sector Overview*);
- outlining the critical workforce challenges and opportunities (*Employment*);
- forecasting future skills priorities by describing trends in workplace and job design (*Skills Outlook*); and
- proposing and prioritising training product development and review activities (*Training Product Review Plan*).

This April 2017 update to the Sustainability Skills Forecast and Proposed Schedule of Work augments the earlier work plan submitted in September 2016 with an executive summary, incorporation of updated priorities for training product development and review following recent consultations with the MSA Strategic Board Sub-Committee IRC and State Training Authorities.

What is sustainability?

While not an industry, sustainable business practices are becoming increasingly common place across most industries by benefitting business and the environment through the adoption of lean and agile processes, and sustainable environmental practices. Sustainability aims to improve productivity and efficiency through embedding sustainable operations, environmental monitoring and technology and Competitive Systems and Practices.

The growing importance of Corporate Social Responsibility and national and international government policies and agreements provide a fertile environment for industry broadly to embrace sustainability to not only enhance their operations but to create opportunities and markets. The development of sustainability is impacted by challenges including thin markets and transitioning of sectors that are more traditionally associated with sustainability such as mining.

Critical workforce challenges and opportunities

A prediction of employment growth in environmental sciences is expected to increase demand for skills and potentially occupations in niche areas of sustainability such as carbon auditing and environmental monitoring and management. As the relevance of sustainability in the workplace applies to all industries, this has widespread applicability and potentially provides significant opportunities for the creation of new jobs and new skills.

Stakeholder feedback indicates that workforce supply challenges exist at two levels:

- national and organisational policy and policy development in relation to environmental practices and the absence of a direct link between ANZSCO codes and employment outcomes in sustainability; and
- availability of appropriately skilled and qualified trainers with suitable resource materials, low uptake of sustainable operations and environmental monitoring strands in the Training Package and implementation of the Training Package which was specifically designed for workplace delivery.

Forecasting skills priorities

The skills priorities have been informed by international and national trends and stakeholder feedback.

Workplace and job design are critical components of sustainability through which skills in sustainable business practices, lean and agile processes and sustainable environmental practices are developed. Multiskilling workers in this sector with business and social media skills and those in design thinking and innovation will make them more attractive.

Training Package priorities

The Training Package Review Plan 2017-18 to 2020-21 was developed by the IRC with support from IBSA Manufacturing based on identified industry trends. This plan lists the priorities over the next four years, the rationale for these priorities, and the proposed scope and timeframes for these activities.

The items identified as critical and proposed for inclusion as a priority for the 2017-2018 schedule of work are:

- **Carbon Auditing:** Review training package to ensure there is adequate content associated with the skills and capabilities associated with carbon auditing.

The IRC Skills Forecast and Proposed Schedule of Work 2017-18 to 2020-21 table provided at the end of this document lists the priorities for subsequent years.

Administrative Information

Name of Industry Reference Committee (IRC): MSA Strategic Board Sub Committee

Name of Skills Service Organisation (SSO): Innovation & Business Skills Australia (IBSA Manufacturing)

Sector Overview

Sustainability - Snapshot of the industry

While not an industry sector, sustainability is a goal for most enterprises, and is a broad term encompassing both business and the environment. The MSS Sustainability Training Package has been developed and refined over a number of years to encapsulate all industries in both sustainable business practices through lean and agile processes and in sustainable environmental practices.

Traditionally businesses maintain a strong focus on factors that have a clear and direct effect on their economic performance. This is often assessed by looking at financial measures, such as cost of materials and overheads, quantity of sales and profit margins. Increasingly, firms are taking a broader view and taking account of their relationship to the environment and the community.

A broad future focus is essential for the long-term viability of a business and 'sustainability'. There are many areas a business might achieve sustainability improvements, often without big budgets. Low cost energy and water-saving devices and behavioural change can have a high impact. A business can also target management and organisational processes to embed sustainability activities in the workplace.

The qualifications available in the MSS Sustainability Training Package cover sustainable operations, environmental monitoring and technology, and Competitive Systems and Practices. They focus on helping operations become more sustainable through improved productivity and efficiency and meeting their environmental responsibilities.

There are a diverse range of enterprises that are working towards these goals. However, 'sustainability' is not their core business and often the work that is being undertaken is 'hidden' in titles such as 'Corporate Social Responsibility', 'energy efficiency' or 'lean'. Consultations undertaken for the MSS Training Package involved participants from a wide range of industries, including engineering products, carpet and flooring, printing, furnishing, bathroom products manufacturing, glass production and precast concreting as well as registered training organisations (RTOs).

Qualifications available in MSS Sustainability Training Package

- MSS20316 Certificate II in Competitive Systems and Practices
- MSS30316 Certificate III in Competitive Systems and Practices
- MSS40116 Certificate IV in Sustainable Operations
- MSS40216 Certificate IV in Environmental Monitoring and Technology
- MSS40316 Certificate IV in Competitive Systems and Practices
- MSS50116 Diploma of Sustainable Operations
- MSS50216 Diploma of Environmental Monitoring and Technology
- MSS50316 Diploma of Competitive Systems and Practices
- MSS60316 Advanced Diploma of Competitive Systems and Practices

- MSS80116 Graduate Certificate in Sustainable Operations
- MSS80216 Graduate Certificate in Environmental Management
- MSS80316 Graduate Certificate in Competitive Systems and Practices
- MSS80416 Graduate Diploma of Competitive Systems and Practices

Release 1.0 of the MSS Sustainability Training Package was approved by the Australian Industry and Skills Committee at its June 2016 meeting.

Regulation of industry/occupations

Some of the qualifications in the MSS Sustainability Training Package target the skills required to improve an organisation's environmental sustainability performance. Within individual organisations, sustainability is impacted by regulations which vary depending on the State or jurisdiction within which the organisation operates.

Industry is subject to a range of environmental and sustainability related regulatory control. Depending on the actions taken by individuals to improve environmental and sustainability outcomes for organisations, occupational licences may be required e.g. electricians undertaking sustainability related improvements to equipment will need an electrical worker's licence. The occupational licences required will vary with the nature of the work and to some extent location, as most regulations are State based and some are enforced by local government. This Training Package allows for these differences without mandating them to specific units of competency which may not be appropriate.

Challenges and opportunities in the sector/sub-sector at the international/national/jurisdictional or regional level

For this section the following potential challenges and opportunities facing the sector have been identified:

Challenges:

- Downturn/transition of the resources sector
- Trans Pacific Partnership (TPP) and Free Trade Agreements (FTAs)
- Government policy
- Rising importance of social acceptance (Corporate Social Responsibility)
- The Australian dollar
- Science, technology, engineering and mathematics (STEM) skills
- Foundation skills
- VET reform/privatisation/changes to TAFE
- Thin markets (training delivery/availability of providers/skilled trainers)
- Environmentally modernising industry

Opportunities:

- National Innovation and Science Agenda
- The Paris Climate Agreement
- Rising importance of social acceptance (Corporate Social Responsibility)
- Trans Pacific Partnership (TPP) and Free Trade Agreements (FTAs)

Stakeholders all agreed that ongoing VET reform and changes to government policy pose significant challenges for the uptake and implementation of sustainability activities within organisations. Many are looking beyond Australia at

international trends and see the value of developing policies and practices in this area. The recent announcement of the Clean Energy Innovation Fund¹ by the Australian government has been welcomed by stakeholders.

The Training Package can be delineated into three strands – sustainable operations; environmental monitoring and technology; and competitive systems and practices (CS&P). The CS&P strand has been by far the most utilised strand and stakeholders are unanimous in the value of these qualifications and units across a range of industry sectors.

Most of the MSS qualifications have been designed to add to or extend an existing occupational skills base. The environmental monitoring qualifications could be seen as leading to an occupational outcome.

The sustainable operations qualifications have struggled to obtain traction. This may have been in part due to the number of accredited courses (8) and accredited course units/modules (48) previously available in state-based accredited courses. Currently there is only one such program – the Western Australian Certificate IV in Understanding and Negotiating Sustainability Issues. The previous preference for RTOs to offer and deliver these courses could have been through the requirements for trainers' skills and qualifications where they may not have been as demanding as those required to deliver the national qualifications. That is, where the qualifications have not been made available.

Because of the diversity of enterprises using qualifications from the Sustainability Training Package, the range of challenges and opportunities facing stakeholders are also diverse. The ongoing volatility of the Australian dollar has been a major contributor to the demand across all industries for skills and knowledge to improve productivity and ensure the ongoing sustainability of enterprises.

The impact of the slowdown in the resources sector is seen as both a challenge and an opportunity for enterprises using qualifications from the Training Package in this sector. Initially, resources enterprises and the mining service organisations saw little need to adopt competitive systems and practises. However, shrinking profit margins and increasing costs are driving these enterprises to examine methods to improve productivity². It is expected that this will drive enterprises to seek people with skills in areas such as 'Lean', Six Sigma, and 5S and hence drive an increase in the uptake of competitive systems and practices skills and qualifications. Corporate Social Responsibility (CSR) is seen by many stakeholders as both a challenge and an opportunity. Increasingly consumers are demanding that the businesses that they engage with are implementing CSR policies. Such policies may include good environmental practices, waste reduction and product sustainability, energy efficiency as well as ethical behaviour towards employees, clients and communities in which they operate. All of these policies contribute to building business sustainability and are topics covered in the qualifications in the MSS Sustainability Training Package.

Among the other challenges and opportunities identified by stakeholders, 'environmentally modernising industry' and educating employers and students to become informed consumers of training products were listed. In relation to the MSS Training Package, stakeholders expressed concern that employers and students lacked an understanding of the Training Package and its purpose. As a result, they were choosing qualifications that were not the best solution

¹ Australian Government, 2016, Fact Sheet – Clean Energy Innovation Fund, <http://www.environment.gov.au/minister/hunt/2016/pubs/mr20160323-factsheet.pdf>

² Lala, A, Maya, M, Rehbach, S and Sellschop, R, 2016, Productivity at the mine face: Pointing the way forward, McKinsey & Company, <http://www.mckinsey.com/industries/metals-and-mining/our-insights/productivity-at-the-mine-face-pointing-the-way-forward>

for their skill needs. For example, employers were choosing a CS&P qualification when a Sustainable Operations qualification would be more suitable for the business outcomes that they were wanting to achieve. There was also concern expressed that some providers were delivering the CS&P qualifications as institutionally-based stand-alone qualifications when they have been specifically designed for workplace-based, whole of business process delivery. There is a concern that such practices will undermine the integrity of the qualifications and the value to business sustainability.

Stakeholders are uncertain about the impact that Free Trade Agreements and the Trans Pacific Partnership will have on skills in relation to the Sustainability Training Package. Some see this as an opportunity with enterprises increasingly needing the skills within the Training Package to drive productivity improvements needed to compete in an increasingly global marketplace. Others see the Agreements as creating an unequal playing field which will further reduce profit margins, leading enterprises to see the upskilling of workers as an unnecessary expense.

There have been also some significant opportunities identified with some stakeholders providing examples of successful projects across multiple industries. One example provided was of a local government project in New South Wales involving households, small business and community. Another example was an industry initiative in Tasmania involving a diverse group of companies from the refining, rail, engineering and chemical industries. The project allowed manufacturing industry employees from the varied businesses to learn the methodologies behind lean manufacturing and how to implement a lean culture in their own work areas³. The ability to contextualise these qualifications to meet the skill needs of enterprises across a range of industries is a major strength of the Training Package.

The introduction of the National Innovation and Science Agenda (NISA)⁴ this year is viewed by many stakeholders as an opportunity for growth and improved productivity. This has led to a call for the inclusion of skills to support innovation and science in the Training Package – skills such as design thinking, problem solving, a greater focus on STEM skills, product development and design process, change management.

Stakeholders identified that the Training Package could be used across a diverse range of industries and applications, not necessarily be restricted to large businesses. All stakeholders identified synergies between the units of competency within the Training Package and all industries.

³ Australian Maritime College, 2016. Industry initiative drives lean culture in North-West Tasmanian businesses. <https://www.amc.edu.au/news/industry-initiative-drives-lean-culture-north-west-tasmanian-businesses> . May 23.

⁴ Australian Government, 2016, National Innovation and Science Agenda, <http://www.innovation.gov.au/>

Employment

Employment outlook

It is difficult to provide an employment outlook as the qualifications in the Sustainability Training Package do not lead to an employment outcome for the most part. They have a focus on changing business practices and culture. The qualifications are specifically designed for workplace delivery and in such, by increasing productivity and enhancing the company's viability by adding value to the triple bottom line. This in itself will provide more sustainable employment opportunities now and in the future.

The importance of this Training Package to industry is best measured by the success of its uptake by industry. In 2014, 26,255 people were enrolled in qualifications from the MSS11 Training Package. Since 2010, a total of 67,992 people have enrolled through publicly funded training in qualifications from this Training Package or the Competitive Manufacturing/Competitive Systems and Practices qualifications which were in the Training Package prior to the release of MSS11⁵. The number of enrolments have quadrupled over the five year period.

This industry is well serviced by RTOs, many of them private and operating in the fee-for-service sector. For example, 101 RTOs have MSS40312 Certificate IV in Competitive Systems and Practices on scope. Of these, 78 are private providers and five are industry associations⁶.

Workforce supply-side challenges and opportunities

The biggest workforce supply-side challenge identified by stakeholders is having access to appropriately skilled, knowledgeable and experienced trainers to meet demand. A sufficient depth of knowledge behind lean principles and practices, as well as learner resources and tools, is required to successfully deliver competitive systems and practices in the workplace. Additionally, employers require case studies that identify the Return on Investment, exemplify how the experience is enhanced by on the job delivery and demonstrate the benefits that can be gained by whole of workplace implementation of these principles.

Another delivery issue, and therefore supply issue, is shown in the low uptake of sustainable operations and environmental monitoring qualifications (see previous commentary in 'Challenges and Opportunities...').

The other factor affecting the implementation of sustainable operations and environmental monitoring in the workplace is a lack of policy imperatives. Without policy there may be a lack of impetus to implement these practices. This contributes to a shortage of providers due to the non-viability of providing training in thin markets.

According to IBISWorld, the Environmental Science Services industry sector is currently employing 35,400 people and is predicted to grow to 39,037 by the year 2021. Over half of the businesses operating in this sector are located in NSW and VIC, with another 40% in the mining states of WA and QLD. Revenue growth in this sector is predicted to grow by 2.9% from 2016-2021⁷. Based on these projections the demand for people with skills in this area is expected to grow. Current discussions around carbon emissions policy has been influential in driving stakeholders'

⁵ National Centre for Vocational Education Research, 2016, VOCSTATS, Total VET Activity. <http://www.ncver.edu.au/resources/vocstats.html> Extracted on 04/04/16

⁶ Training.gov.au, 2016, MSS40312, Organisation/RTO search, data extracted May 2016

⁷ IBISWorld, 2016. M6925 Environmental Science Services in Australia Industry Report. May 2016. Note: This sector includes coverage of testing services outside the coverage of the environmental monitoring qualifications.

calls for the inclusion of carbon auditing skills in the Training Package. Australia's commitment to the Paris Climate Agreement will further drive demand for skills in environmental monitoring and management.

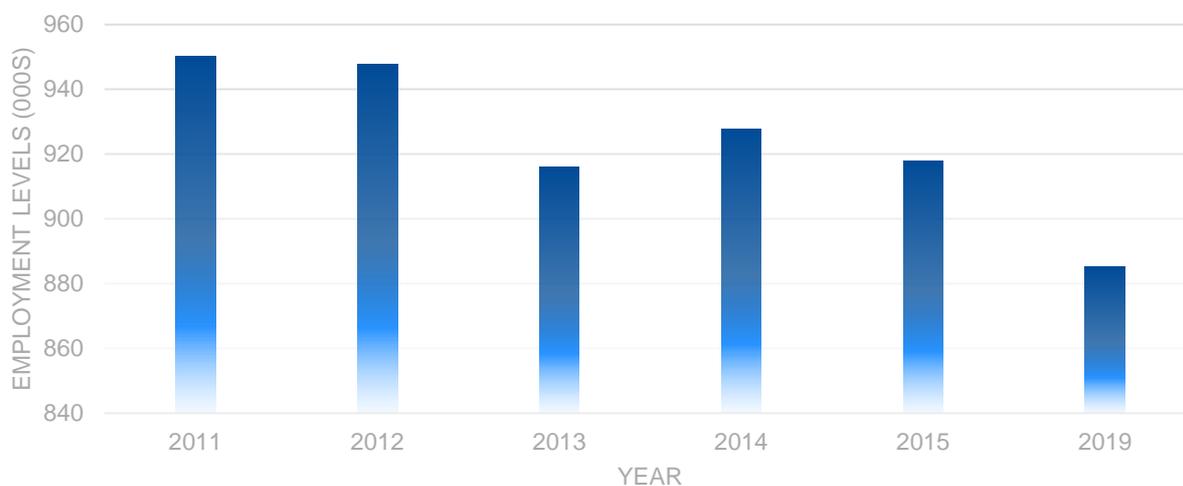
Additional information

The following graphs have been supplied by the Department of Education and Training. The Department has sourced national occupation-related data from the Department of Employment and the Australian Bureau of Statistics to inform the work of the IRCs.

The IRC notes that these graphs only cover a very small slice of industry sectors and occupations that could be users of skills covered by the MSS Sustainability Training Package.

Manufacturing – Employment Levels (000s)⁸

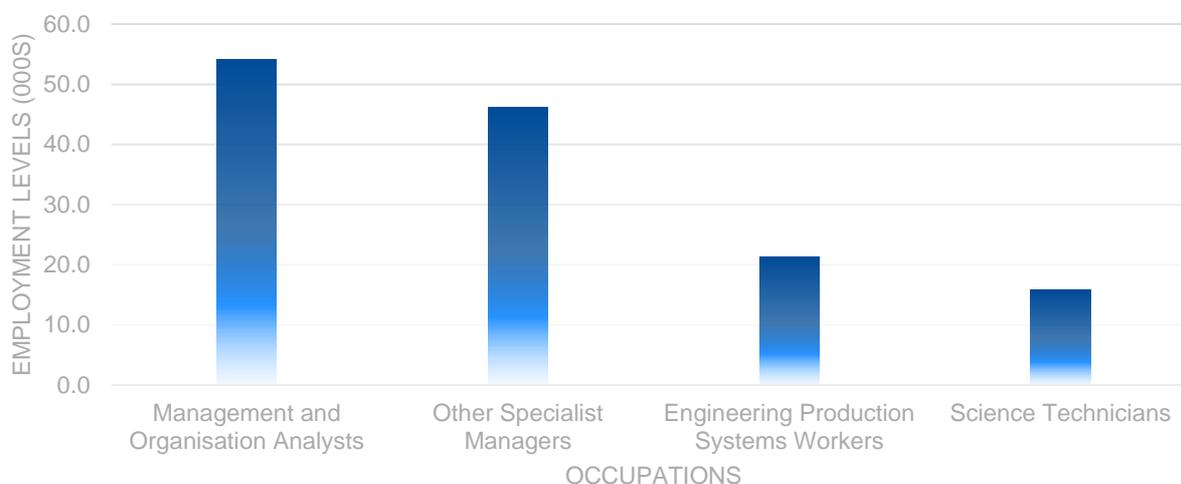
Source: Department of Employment Labour Market Information Portal.



⁸ Note: Figures are displayed at the ANZSIC Division level C. The graph includes current and historical employment levels, as well as a projected employment level to 2019

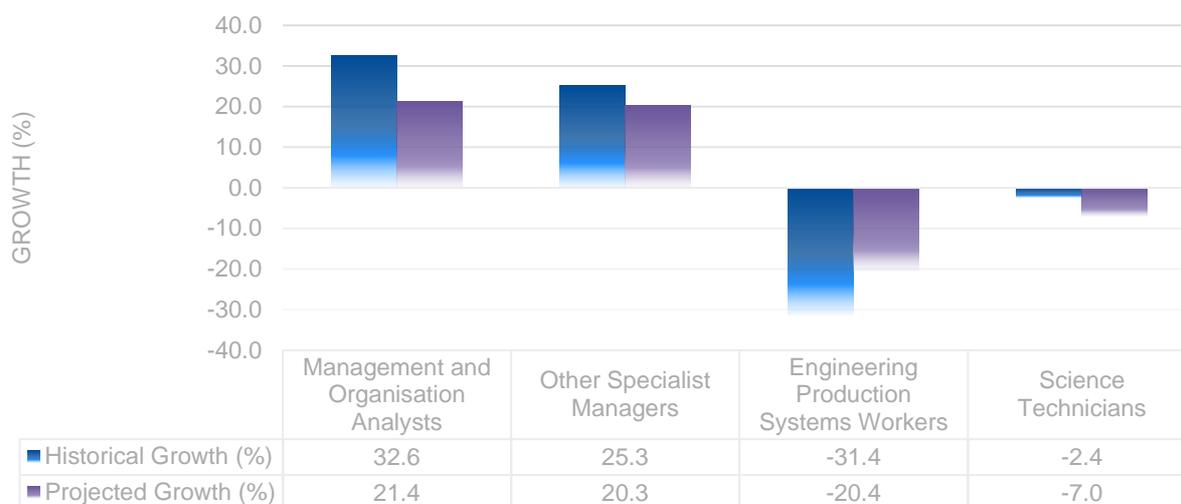
Key Occupations – Employment Levels (000s)⁹

Source: Australian Bureau of Statistics (ABS)



Key Occupations – Historical and Projected Employment Growth (%)¹⁰

Source: Historical employment growth from the Australian Bureau of Statistics (ABS) and projected employment growth from the Department of Employment.



⁹ Note: Occupations are at the four digit ANZSCO code. Employment levels are the five year annual average to 2015. Figures include all employed in the occupation across the economy, not just the relevant industry.

¹⁰ Note: Occupations are at the four digit ANZSCO code. The historical employment is the five year growth rate to 2015 and the projected employment growth rate is the expected growth rate to 2019. Rates are based on figures that include all employed in the occupation across the economy, not just the relevant industry.

IRC analysis

The Department has chosen what they describe as 'four key occupations' for analysing employment levels, as displayed in the two 'Key Occupations' graphs. This is presumably under the assumption that these occupations employ the greatest number of workers with qualifications from the MSS Sustainability Training Package. While Other Specialist Managers and Science Technicians may represent some, the remaining occupations chosen are not an accurate reflection of employment outcomes from this training package.

As stated earlier in this IRC Skills Forecast and Proposed Schedule of Work, qualifications in the Sustainability Training Package do not lead to an employment outcome for the most part and therefore are challenging to link to ANZSCO codes. The Competitive Systems and Practices (CS&P) qualifications have a focus on changing business practices and culture, and are often delivered across the whole workplace. They commonly are an additional qualification designed to enhance the capabilities of workers operating at many, if not all levels of an organisation from those with entry level skills to those who operate at the Diploma or Bachelor level of skill.

Similarly, the Environmental Monitoring and Technology suite of qualifications can be skills used by regulators, auditors and services such as laboratory and field testing, consultants, environmental assessment and remediation contractors.

The group 1399 Other Specialist Managers includes the following occupations:

- 139911 Arts Administrator or Manager
- 139912 Environmental Manager
- 139913 Laboratory Manager
- 139914 Quality Assurance Manager
- 139915 Sports Administrator
- 139999 Specialist Managers

This broad group covers many occupations with skills commensurate with a bachelor degree or higher qualification¹¹, and from additional sectors whom are unlikely to have training in the CS&P qualifications. It is possible that an Environmental Manager or Laboratory Manager may have qualifications in the Environmental Monitoring and Technology qualifications. Other occupational codes under which those providing environmental monitoring services may be employed can be found in the table on page 13.

One example of this is the specific occupations that have been targeted as in demand on the Western Australia's State priority occupation list (SPOL). The one relevant to the MSS Training Package is 139913 Laboratory Manager¹². The predicted growth in demand for Laboratory Managers in WA is due to the movement from construction to operations in the Resources sector¹³, and the robust growth in employment in Oil and Gas

¹¹ Australian Bureau of Statistics, 2013. 1220.0 ANZSCO Australian and New Zealand Standard Classification of Occupations, <http://www.abs.gov.au/ausstats/abs@.nsf/Latestproducts/1220.0Contents02013,%20Version%201.2?opendocument&tabname=Summary&prodno=1220.0&issue=2013,%20Version%201.2&num=&view=>

¹² Resources Industry Training Council, 2015. Industry Workforce Development Plan – Downstream Process Manufacturing. <http://www.ritcwa.com.au/#!iwdp-new/c1nmi>

¹³ Ibid

Operations as new gas trains come on line¹⁴. This need may also extend to requiring environmental monitoring skills as the company seek compliance with environmental policy.

The following table provided by IBSA to the IRC uses Occupational Projections made by the Department of Employment up to 2020¹⁵. Like the 'Other Specialist managers' group, the two extra groups chosen in this table will likely have skills commensurate with a bachelor degree or higher. Some businesses may have a role which uses these environmental monitoring skills, in addition to other job-specific skills.

Employment projections for occupations relevant to the MSS Training Package.

Occupation Code	Occupation	Employment level - November 2015 ('000)	Department of Employment Projections		
			Projected employment level - November 2020 ('000)	Projected employment growth - five years to November 2020	
				('000)	(%)
1399	Other Specialist Managers	49.5	61.1	11.6	23.5
2339	Other Engineering Professionals	6.7	7.3	0.6	9.1
2343	Environmental Scientists	18.7	19.3	0.6	3.0

Source: Department of Employment

¹⁴ Masige, S, 2016. Gorgon LNG production on track. Australian Mining. 2 August. <https://www.australianmining.com.au/news/gorgon-lng-production-track/>

¹⁵ Department of Employment, 2016, Employment Projections. Occupation projections. <http://lmip.gov.au/default.aspx?LMIP/EmploymentProjections>

Skills outlook

International and national trends in workplace design and/or job design

The qualifications in the Sustainability Training Package focus on both workplace and job redesign and incorporate strategies and processes that are well used and influential both in Australia and internationally. The Training Package has been designed to assist Australian businesses to incorporate these cutting edge business practices into their operations.

Stakeholders also identified other factors which impact on workplace/job design. The need to adapt to changing business conditions was listed as a major impact in that to do so successfully requires the business to change its mindset and be more responsive to stakeholders and their communities. Problem solving skills are needed to assist with this. Some stakeholders are seeing a move away from technical skills to more generic skills in machine operations, driven largely by the rapidity of technological change. This is driving stakeholders to request the addition of business skills to the Training Package.

Social media is also expected to drive changes to job roles as the need to have a social media presence becomes a tool for marketing. Design thinking and innovation management are also identified as impacting on both workplace and job design.

The five most important skills for the sectors workforce within the next three to five years.

Rank	Skill	How identified
1	Customer / client relations / corporate social responsibility	Industry consultations
2	Problem solving	Industry consultations
3	Generic machine operations	Industry consultations
4	Social media / marketing	Industry consultations
5	Design thinking and innovation management	Industry consultations

Generic workforce skills

Ranked from 1 being the most important, to 12 being the least important.¹⁶

1	Managerial / Leadership
2	Environmental and Sustainability
3	Customer service / Marketing
4	Communication / Virtual collaboration / Social intelligence
5	Design mindset / Thinking critically / System thinking / Solving problems
6	Data analysis
7	Technology
8	LLN
9	STEM
10	Learning agility / Information literacy / Intellectual autonomy and self-management
11	Financial
12	Entrepreneurial

¹⁶ Pre-populated table provided by the Department of Education and Training

Other relevant skills-related insights for this sector

As previously discussed, stakeholders are concerned about the supply of appropriately skilled, knowledgeable and experienced trainers to meet future demand. Accompanying this concern is the fact that some RTOs are providing wholly institutional-based delivery of the Competitive Systems and Practices qualifications. This delivery mode fails to acknowledge the intent of the qualifications which is to encourage whole-of-organisation change to improve business processes and productivity. The qualifications have been specifically developed for workplace delivery.

Training Product Review Plan 2017-2021

In September 2016, stakeholders were generally satisfied with the MSS Training Package and reported that the Competitive Systems and Practices qualifications were well designed with a clear vision and were non-prescriptive. They expressed concern that the new process (for review) will lose that clarity and maximum flexibility that is currently available to meet individual company needs.

The IRC Skills Forecast and Proposed Schedule of Work 2017-18 to 2020-2021 table provided at the end of this document list the priorities for the next four years. This table also provides the rationale for these priorities, the proposed scope and timeframes for these activities.

Items identified as time critical and to be included in the priorities for 2017-18

The items identified as critical and proposed for inclusion as a priority for the 2017-2018 schedule of work are:

- **Carbon Auditing:** Review training package to ensure there is adequate content associated with the skills and capabilities associated with: carbon auditing.

Additional factors for consideration

In September 2016, most stakeholders reported that they would rather see units of competency from the MSS Training Package exported to other Training Packages than a proliferation of new units and skill sets.

The following priorities were reported in the September 2016 plan and have been removed from the proposed schedule work at this time but have been listed below for future consideration by the new IRC once established:

- Advanced manufacturing – market research and consumer behaviour
- Managing data and information management
- Flexibility within the Package to include skill sets
- Merchandising/planning units that already exist need to be more explicit.
- Implementation Guide to address the findings of the 2010 Review of Disability Standards for Education 2005.

IRC Signoff

This IRC Skills Forecast and Proposed Schedule of Work was agreed as the result of a properly constituted IRC decision and was approved by the Chair, Megan Lilly on 26 April 2017.