

Textiles, Clothing and Footwear Industry Reference Committee

Industrial Sewing
2019 Case for Change



Administrative Information

Name of Industry Reference Committee (IRC):

Textiles, Clothing and Footwear (TCF)

Name of Skills Service Organisation (SSO):

Innovation and Business Skills Australia (IBSA Manufacturing)

About the Industry Reference Committee

The Textiles, Clothing and Footwear Industry Reference Committee comprises ten members and was constituted in August 2017.

The 2019 Case for Change was reviewed and approved by the membership below:

Mr Leon Drury (Chair)

Ms Meriel Chamberlin

Ms Kay Gerard

Ms Jenny Kruschel

Mr John Condilis

Ms Alison Bradshaw

Ms Ana Drougas

Ms Millie Gilbert

Ms Hilde Heim

Ms Kerryn Wollington

About this Case for Change

This Industrial Sewing Case for Change will be included in the 2019 Textiles, Clothing and Footwear Industry Skills Forecast and Proposed Schedule of Work.

Industry Reference Committee Signoff

This 2019 Industrial Sewing Case for Change was agreed as the result of a properly constituted IRC decision and was approved by:

IRC Chair: Leon Drury

Date: [Month] 2019

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This 2019 Industrial Sewing Case for Change has been prepared on behalf of the Textiles, Clothing and Footwear Industry Reference Committee for submission to the Australian Industry and Skills Committee (AISC). This document has been produced with the assistance of funding provided by the Commonwealth Government through the Department of Education and Training.

Industrial Sewing

Textiles, Clothing and Footwear IRC

MST Textiles, Clothing and Footwear Training Package

Contact details: Mr Leon Drury (Chair)

Date submitted to Department of Education and Training: [Month] 2019

Description

The project will develop an Industrial Sewing Skill Set that is applicable to several related industry sectors for the development of transferable, entry-level skills to facilitate the movement of workers with similar skills and assist employers experiencing skill shortages.

Rationale

Industrial sewing (machinist) is a skill required in a broad range of contexts within furnishing, automotive, marine and textile fabrication industries. Although the number of machinists is relatively small it is a skilled occupation critical to these industries. The foundational industrial sewing skills to be included in the proposed skill set are central to the operation of manufacturing businesses in these industry sectors. Employers in several sectors have provided feedback through industry consultation about the shortage of skills and difficulty in recruiting workers with industrial sewing skills for the following reasons:

- Thin markets – full TCF qualifications are not being delivered by Registered Training Organisations RTOs due to thin markets.¹ This is evidenced in low take up of some TCF qualifications by with a viable training product. A Skill Set may provide a more viable product offering for RTOs as it has the potential to open a pathway for learners into other occupations.
- Ageing workforce – experienced workers are reaching (or often past) retirement age. Employment data indicates that 45% of workers in the Textiles, Clothing and Footwear Production sector of the TCF industry are aged over 50.²
- Offshoring – over the last two decades the offshoring of sewing production has radically decreased the size of the Australian workforce with sewing skills. Few new recruits have been skilled to enter the workforce during this long period of downsizing.
- Gender sensitivities regarding males undertaking "sewing" skills training or undertaking a career in "industrial sewing" have also contributed to the low uptake

The development of a skill set for industrial sewing that includes common industrial sewing skills that can be applied to a range of industry, products and materials provides a pathway for the upskilling or reskilling of workers and skilling of new entry level recruits.

¹ Food, Fibre and Timber Industries Training Council (WA) Inc, Thin Markets: Improving workforce development opportunities in thin markets of the food, fibre and timber industries, 2017.

² Department of Jobs and Small Business, Labour Market Information Portal.

Although the size of the workforce in the Textiles, Clothing and Footwear Production sector has declined steeply since 2006 (with a reduction of 6,368 employees over the decade to 2016), employees.³ Those aged 50 years and over are leaving the industry at a slower rate than those in younger age brackets. Employers in the sector are reporting that this amplified ageing of the workforce is adversely impacting the availability of skilled workers as older workers begin to reduce their hours or leave the industry altogether. Employers expect this impact to escalate in coming years, especially since business conditions have stabilised in some parts of the sector with businesses successfully targeting niche, high-end markets. Some products in the Cut and Sewn Textile Product Manufacturing, such as canvas awnings, tarpaulins and shade sails, face limited competition from imports due to the high manufacturing standards of domestic firms. Opportunities exist for manufacturers to focus on producing niche, high value-added and export-oriented textile products.⁴ As a result, employers in a variety of TCF, Furnishing and Light Manufacturing sectors require skilled workers to meet demand for quality, bespoke and customised Australian-made products. The ageing of the TCF workforce is having a marked impact on the industry's ability to maintain skills and knowledge, a problem shared through the western world as reported by Alvanon in their 2018 survey report *The State of Skills in the Apparel Industry*.

*The last generation of people who possess hands-on experience in factories and deep industry knowledge are now between 55 and 75 years old. There is only a small window of time left to harness and encapsulate some of that experience into learning journeys for both corporates and individuals.*⁵

The report found that despite business awareness of the impending loss of workforce skills, most companies fail to implement training solutions. IBSA Manufacturing consultation with industry confirms similar experience in Australia. Although employers are keen to retain the knowledge and skills of experienced workers, they do not have mechanisms that enable this knowledge and skill to be passed on. This is further compounded as often they do not have anyone to pass the skills and knowledge on to.

Enrolments in most TCF qualifications have been declining over recent years, although the Certificate III in Clothing and Textile Production has recorded enrolment growth of 55% between 2014 and 2017 (from 290 enrolments in 2014 to 449 enrolments in 2017).⁶ Employers report difficulty sourcing workers with suitable entry-level skills in a wide range of TCF production roles. This problem is exacerbated by the wide selection of elective units that learners may complete as part of a TCF qualification.

Employers and RTOs have identified the economies of scale that could be realised by making training available that meets basic entry-level needs and is applicable across several industry segments. An Industrial Sewing Skill Set has potential to fill

³ Department of Jobs and Small Business, Labour Market Information Portal

⁴ IBISWorld Industry Report C1333 Cut and Sewn Textile Product Manufacturing, January 2018

⁵ Alvanon and MOTIF, *The State of Skills in the Apparel Industry*, 2018

⁶ NCVER VOCSTATS, extracted on 29/08/2018

this identified workforce development gap. Below is a breakdown of each industry and examples of products where industrial sewing skill set applies:

- Marine trimming – canopies, boat covers, seat covers and awnings
- Motor trimming – vehicle seats, seat covers and interiors
- Blinds and awnings – heavy duty curtains, external canvas awning and shade blinds
- Upholstery – furniture covering
- Clothing manufacturing – uniforms and garments made from heavy materials
- Leather and canvas – handbags, ute covers, leather jackets, saddles, tents/tarpaulins and swags
- Specialised textiles – shade sales and banners
- Automotive aftermarket products – motor vehicle awnings, roof top tents and awning rooms
- Cut and sewn textile product manufacturing – household textile goods such as curtains and blinds, canvas awnings, linen, shade sails, tarpaulins, tents, towels and soft furnishings

The customised and bespoke nature of much of the modern Australian TCF industry relies on workforce flexibility. Employers need workers who can shift between roles and tasks. They also need access to additional workers during busy periods. Employers have identified examples of their workforce skills need as follows.

- Upskilling, eg. workers who would be more useful across the business if they could add industrial sewing to their existing skills
- Initial skilling, eg workers who could use industrial sewing as the basis for their entry into the industry
- Reskilling, eg workers who could move more seamlessly between industry segments if they added industrial sewing to their existing skills and experience.

For individuals who do not need the full qualification the proposed skill set would provide entry to employment and improve job portability and employment flexibility. The skill set would also equip individuals skilled in one of the identified industry sectors with adequate skills to be able to work across multiple industry sectors, in job roles utilising a similar skill base to produce a broad range of products all relying on competent operation of industrial sewing skills:

Impact of Change

The proposed skill set will support the development of transferable, entry-level skills, allowing workforce mobility across the range of industry sectors listed above.

Impact of the recommended changes on stakeholders and on other training packages:

- Employers – are more likely to be able to access training to upskill existing workers (by combining training for multiple industry sectors some of the barriers of provision in thin markets will be overcome); employers will also have a larger pool of potential recruits with basic entry-level skills

- Employees – will be able to access training to broaden their skills enabling movement into related industry sectors
- Students – will have access to short, targeted training that provides a good foundation for workforce entry in a variety of industry sectors. The skill set will also open up a pathway into trade qualifications.
- RTOs – will have a viable training product that serves the needs of several industry sectors, and allows for contextualisation to meet specific employer or learner needs
- Government – will have a training product that is targeted for the development of entry-level skills that are in demand across multiple industry sectors
- Other training packages – will experience greater RTO and learner take-up of existing units of competency that have been identified by industry as necessary in the workforce.

The proposed industrial sewing skill set will bring together existing units of competency aligned to the skills required of an industrial machinist from across training packages. Initial consultation has identified the following units for consideration in an industrial sewing skill set:

- AURVTT020 Select and use leather in automotive and marine trimming
- AURVTT015 Fabricate and install canvas products for automotive and marine components
- MSS402051 Apply quality standards
- MSTTX2009 Perform industrial sewing on textile products
- MSTTX3003 Set up, adjust and maintain industrial sewing machines
- MSTTF2009 Select and apply canvas and sail materials
- MSFBA2004 Construct roll-up and pull-down style blinds and awnings
- MSFUP2004 Machine sew basic upholstery final cover materials
- MSFSF2002 Machine sew materials
- MSFSF2003 Machine sew specialized sewn products

Analysis of these units has identified that there is overlap across some of these units.

The Australian government's Job Outlook web service provides employment information for the occupation of sewing machinists (ANZSCO 7116). Job Outlook reports that the number of sewing machinists fell over the past 5 years and is expected to fall over the next 5 years from 9,700 in 2018 to 8,500 by 2023. Most of the future job openings are predicted to result from workforce turnover, with 4,000 job opening predicted over the next 5 years.⁷

Sewing machinists are employed predominantly in manufacturing industries (76.6%) but are also employed in retail trade (20.0%), arts and recreation services (1.1%), health care and social assistance (1.0%) and other industries (1.3%). Victoria employs the largest share of the sewing machinist workforce (38.3%), followed by New South Wales (24.5%) and Queensland (15.2%).⁸

⁷ Australian Government, Job Outlook, Sewing Machinists ANZSCO ID 7116, accessed 16 January 2019.

⁸ ABS Labour Force Survey, annual average 2017, Cat. No. 6291.0.55.003: Customised Report.

Risks of not undertaking the project:

- RTOs and learners may not recognise the potential for employment in the TCF industry, further exacerbating the shortage of available workers as workforce ageing continues
 - Inability of employers to source the necessary skills may result in a greater level of offshoring or the closure of Australian TCF businesses.
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*Industry
Support for
Change*

Western Australia has identified a skill shortage for sewing machinists in the areas of canvas making, soft furnishing and industries like upholstery since 2010. In 2015 the Food, Fiber & Timber Industries Training Council (WA) Inc published some research on Thin Markets that included a case study about Industrial Sewing which raised the option of developing a skill set as a solution to skill workers to meet industry demand for industrial sewers.

Since then, it has continued to be raised by the Textiles, Clothing and Footwear Industry Advisory Group, particularly with respect to thin markets. It was also identified as a priority in the 2018 Skills Forecast and Proposed Schedule of Work.

IBSA Manufacturing has undertaken further national consultation with industry and RTO's to validate the need for and interest in an industrial sewing skill set. The consultation involved webinars and targeted forums with stakeholders from specialised textile manufacturers held in late 2018. Feedback received validated that issues identified in Western Australia are prevalent in other states and territories.

There was strong support for the development of an industrial sewing skill set as a solution to skill workers to fill machinist roles in thin markets and for small runs and sample work.

*Consultation
Plan*

The IBSA Manufacturing training development uses a five-phase methodology which follows the Training Development and Endorsement Process Policy and. IBSA Manufacturing will coordinate the project and work with the IRC.

Phase 1 – Initial research and analysis

Establishment of a Technical Advisory Committee (TAC) to validate the project scope and plan, to contribute to further industry assessment and to assist in determining industry needs and job role functional analysis.

The IRC will appoint a TAC to inform this work that will have current skills and knowledge across a broad range of industry job roles.

Proposed membership will include representatives from the marine trimming, automotive upholstery and aftermarket products, furniture upholstery and manufactured textiles sectors and other sectors as identified as appropriate.

Further industry assessment will determine the potential users of the skill set, how transferrable industrial sewing skills are between industry sectors, the skills specific to the industrial sewing skills set and the benefits its creation will have on effected industry sectors.

The proposed skill set will be developed under the direction of the TAC and then reviewed by the IRC at each phase.

Phase 2 – Round 1 and public consultation

The first draft of training package components will be developed by the TAC and circulated to the textiles, clothing and footwear industry, the broader specialised textiles industry and RTOs for feedback.

Phase 3 – Round 2 and public consultation

Second drafts of training package components are refined in response to the feedback in line with TAC advice. Further feedback is sought in a second round of consultation from the textiles, clothing and footwear industry, the broader specialised textiles industry and RTOs.

Phase 4 – Approval process

Final drafts are developed in response to further feedback and in line with TAC advice and recommendations are made to the IRC for approval before being circulated to State and Territory Training Authorities for feedback.

Phase 5 – Submission to Department-AISC

Submit to the Department of Education and Training for AISC approval.

Consultation Plan

IBSA will create a project web page to provide project updates, gather feedback from stakeholders and validate training package components.

Proposed consultations include but are not limited to:

- industry representatives and employers to identify the industry, and job requirements, and trends, and work opportunities as recommended by the TCF IRC and TAC members including:
 - relevant associations and industry training boards including members of the following associations:
 - Specialised Textiles Association
 - Australasian Furnishing Association
 - Australian Automotive Aftermarket Association
 - Motor Trades Association of Australia
 - WA Furniture Manufacturers Association
- RTOs with these qualifications on scope and recent or current students, if accessible, to gain feedback on the actual qualifications and employment outcomes
- State Training Authorities to ensure all jurisdictions are engaged
- IRC's with responsibility for units of competency from training packages. IBSA will liaise with the Furnishing and Automotive IRC's through their Skill Service Organisation (SSO) to inform them to reach out to stakeholders which may be affected by this change and where their native unit is being included in the Industrial Sewing skill set and establish a conduit for ongoing feedback and continuous improvement of the units.

Ministers' Priorities Addressed

This Case for Change addresses the following Ministers' Priorities:

- **removing obsolete and superfluous qualifications from the training system to make it easier for consumers to find the training relevant to their needs;**
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The new skill set will draw on existing units of competency. Sewing units in MST, MSF and AUR training packages will be considered for their applicability for use across related industry sectors. This work may lead to recommendations for the removal of obsolete or superfluous units of competency. The development of the skill set is not expected to require the creation of new units of competency simply repackaging and possible revision of existing MST units.

- **making more information available about industry's expectations of training delivery to training providers to improve their delivery and to consumers to enable them to make more informed course choices;**

The development of an Industrial Sewing Skill Set will clearly signal employer requirements for these skills to RTOs. RTOs delivering in this area have previously been aware of industry demands and have in some cases responded by creating courses that will provide similar cross-sectoral outcomes.

Industry's expectations of training delivery will be provided in the Companion Volume.

- **ensuring the training system better supports individuals to move easily from one related occupation to another;**

The new skill set is responding to demand for more transferable workforce skills. It will provide individuals with entry-level skills that are common across several segments of the TCF, furnishing, and automotive/marine industries and enable greater recognition and portability of skills.

- **improving the efficiency of the training system by creating units that can be owned and used by multiple industry sectors and housing these units in a 'work and participation bank';**

The skill set will be applicable to several industry sectors and will be developed with input from affected IRCs in the furnishing and automotive/marine industries. The most appropriate home for the units comprising the skill set will be considered throughout the skill set development. However, while the units are applicable across several industry segments, they are not broadly applicable across the whole workforce. It is anticipated that the most appropriate 'home' for the units will be within their current training package (MST, MSF and/or AUR) and not in a 'work and participation bank'.

- **fostering greater recognition of skill sets**

The proposed development of a cross-industry skill set has the potential to raise awareness among employers and RTOs of the valuable role that skill sets can play in building a skilled workforce through developing entry-level skills, and upskilling and reskilling existing workers.

<i>Potential Outcomes</i>	The development of an Industrial Sewing Skill Set has potential to support greater workforce mobility across sectors of the TCF, Furnishing, Automotive and Marine industries, providing workforce entrants with more diverse employment opportunities and employers with increased access to workers with required entry-level skills.
Scope of Project	
<i>Timing</i>	<p>Estimated Project Duration: 12 months</p> <p>If approved, the project would be undertaken in stages.</p> <p>Anticipated Start Date: July 2019</p> <p>Anticipated Completion Date: Case for Endorsement to be submitted June 2020</p>
<i>Training Package</i>	MST Textiles, Clothing and Footwear Training Package
<i>Qualifications</i>	No qualifications are impacted by this project
<i>Skill Sets</i>	<p>A total of 1 Skill Set will be developed as part of this project:</p> <p>Industrial Sewing Skill Set</p>
<i>Units of Competency</i>	<p>A total of 3 native units of competency are to be reviewed for application and updated if needed as part of this project.</p> <ul style="list-style-type: none"> • MSTTX2009 Perform industrial sewing on textile products • MSTTX3003 Set up, adjust and maintain industrial sewing machines • MSTTF2009 Select and apply canvas and sail materials <p>The following units from other training packages will be assessed for suitability for inclusion in the Skill Set:</p> <ul style="list-style-type: none"> • AURVTT020 Select and use leather in automotive and marine trimming • AURVTT015 Fabricate and install canvas products for automotive and marine components • MSFBA2004 Construct roll-up and pull-down style blinds and awnings • MSFUP2004 Machine sew basic upholstery final cover materials • MSFSF2002 Machine sew materials • MSFSF2003 Machine sew specialized sewn products • MSS402051 Apply quality standards

Detail on training components proposed for work for 2019-20.

Qualification / unit / Skillset	Code and Tit	Previous change (endorsement date)	Previous work (transition / update / establishment)	Work (new / update / deletion)	Entry level / trade / post-trade qualification	Expected date for endorsement
Skillset	[CODE TBC] Industrial Sewing	N/A	N/A	New	Trade / Post trade	June-2020
Unit	MSTTX2009 Perform industrial sewing on textile products	04/07/2016	Update	Potentially updated	Trade / Post trade	June-2020
Unit	MSTTX3003 Set up, adjust and maintain industrial sewing machines	04/07/2016	Update	Potentially updated	Trade / Post trade	June-2020
Unit	MSTTF2009 Select and apply canvas and sail materials ABCDEF5678	04/07/2016	Update	Potentially updated	Trade / Post trade	June-2020