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Department of Agriculture, Water and the Environment

National Agricultural Workforce Strategy – Discussion Paper

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Introduction

The value of agricultural, fisheries and forestry production has increased by 19% in the past 20 years in real terms (adjusted for inflation), from around $58 billion in 1999–2000, to around $69 billion in 2018–19. Agricultural production is now more market-oriented, internationally competitive and focused on consumer demand for premium food and fibre products. Farm consolidation, investment in innovative and value-adding technologies and practices, and moving to higher-value outputs have played a role in improving agricultural productivity.

Changes to the agricultural industry have affected the agricultural workforce. Farm consolidation is opening up opportunities for managerial positions. Innovation and technology adoption are increasing demand for more skilled workers who are able to operate and cope in a fast-moving and complex environment with new risks. Growth in horticulture production and increased use of casual labour in industry sectors, such as the cotton and dairy industries, is driving demand for more temporary or seasonal workers. Business owners need more advanced management skills, including human resource management skills, to manage larger, more complex businesses.

International competition in agriculture is ever present and intensifying for exports and import replacement, and in global markets Australia's relatively high costs of labour challenge national competitiveness. One consequence is the need for a reliable and skilled labour force. Australia is experiencing the effects of an ageing population and internal migration from regional to urban areas. These factors are making it more difficult for agribusiness and related industries to attract the workforce they need.

Industry groups report widely held concerns about the supply of skilled and unskilled workers to meet the needs of agribusiness and related industries. These challenges fuel concerns that workforce issues will impede future productivity and growth, and will be further exacerbated if socio-economic and demographic trends continue. Additionally, challenges such as drought, fire, flood and others can have rapid impacts on workforce demand in specific regions, and create challenges for the labour force that can be relatively long lasting.

In this context, the Australian Government committed to developing a National Agricultural Workforce Strategy. The strategy will consider the challenges facing the industry and recommend actions to support agribusinesses and related industries to support the attraction, retention and development of the future agricultural workforce.

The development of the strategy is being led by the National Agricultural Labour Advisory Committee, which co-authored this discussion paper. The committee was convened by the Australian Government and includes members from academia, the

education and training sector and individual agribusinesses, reflecting the shared responsibility for the agricultural workforce. A successful strategy will rely on this shared responsibility.

This discussion paper seeks your input on:

- the availability of workers, including barriers and impediments
- the effect of changes to the industry, agribusinesses and broader society on the agricultural workforce
- the skills and knowledge of workers and business owners needed to maintain and grow productivity, including in human resource management, AgTech and Artificial Intelligence
- opportunities, best practices, case studies, and priority areas for action.

Please share your ideas to help inform the strategy and the development of a sustainable and skilled agricultural workforce. You can have your say by uploading a submission to *haveyoursay.agriculture.gov.au/national-agricultural-workforce-strategy*. Submissions close on 1 June 2020.

Chapter 1

Context and current situation

The value of agricultural, fisheries and forestry production has increased by 19% in the past 20 years in real terms (adjusted for inflation), from around $58 billion in 1999-2000, to around $69 billion in 2018-19. This growth has been driven by the dedication and hard work of Australia's farming and agricultural enterprises, with agricultural production now more market-oriented, internationally competitive and consumer-focused. Farm consolidation, investment in innovative technologies and practices, promoting and maintaining a 'clean and green' international reputation and developing value-adding manufacturing processes are some of the changes that have played a role in improving agricultural productivity. More, however, is needed to protect Australia in an era where 'clean and green' is business as usual in global markets and claimed by many of our international competitors. On the world stage Australia's costs of living and labour costs are high and labour (skilled and unskilled) is often hard to source. These changes have implications for the agricultural workforce, which includes related services and supply chain sector workforces (Box 1, Figure 1).

Box 1 The agricultural workforce and agricultural occupations

Under the committee's terms of reference, the agricultural industry includes the agricultural, fisheries and forestry industries and their closely allied service and supply chain industry sectors. References to 'agricultural workforce' include the workforces of these sectors.

The agricultural industry encompasses around 400 occupations.

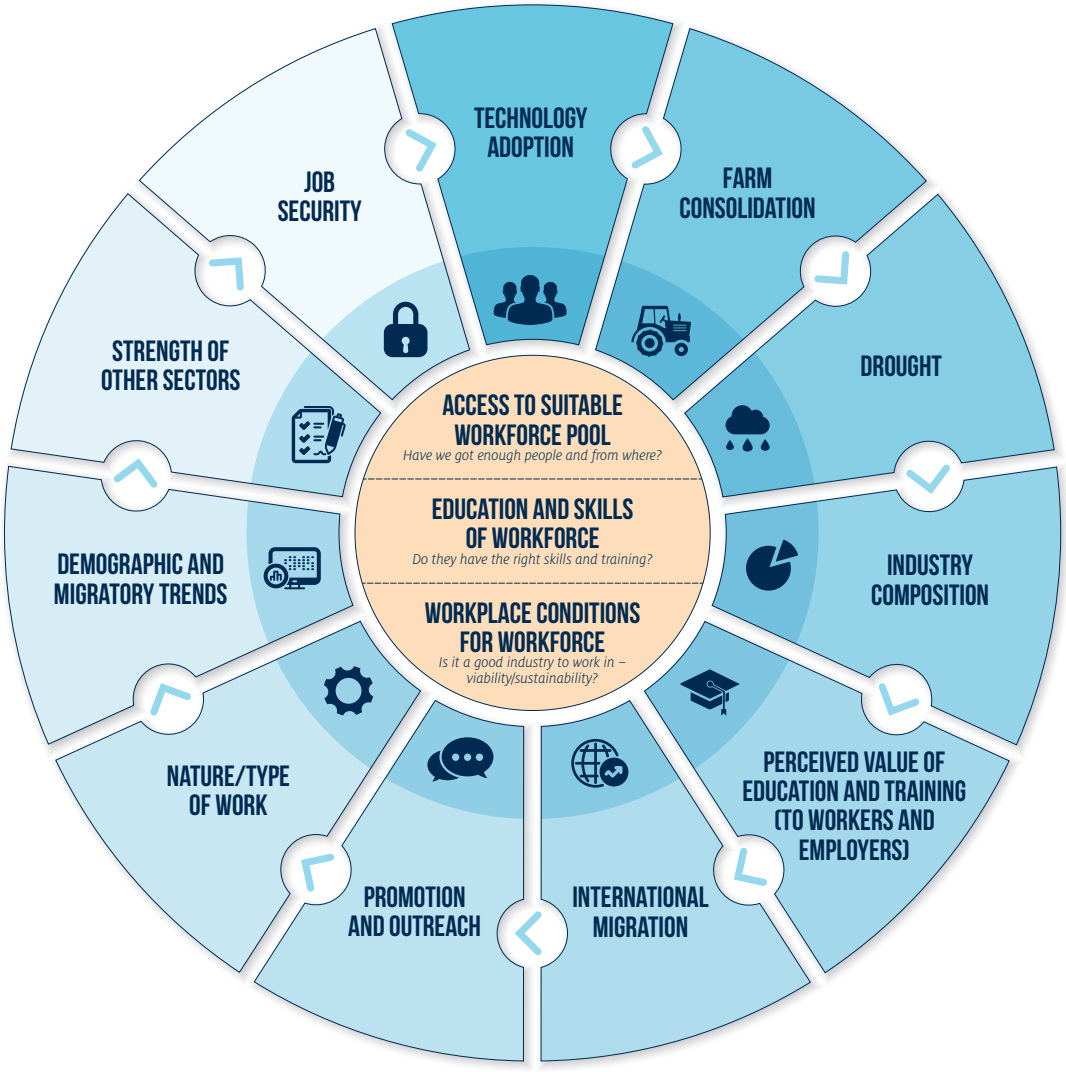
Agricultural businesses rely on a range of allied support services. However, the strength of this alliance varies as some occupations provide general support functions or are more strongly allied with other industries (e.g. payroll clerks, agricultural pilots). Others are more strongly allied with the on-farm production sector (e.g. agronomy services, veterinarians, agricultural engineering). Some processing industries—such as wine manufacturing or meat processing—tend to be more closely allied to the agricultural sector compared to others, such as bakery product manufacturing.

Farm consolidation is opening up opportunities for managerial positions. Innovation and technology adoption are increasing demand for more skilled workers. Growth in horticulture production is driving demand for more seasonal workers. Business owners need more advanced management skills to manage larger, more complex businesses.

Australia is experiencing fundamental changes that have implications for the workforce in rural and regional Australia, where most farming production occurs and related service and processing industries are located. These changes include an ageing population, internal migration from rural and regional areas to urban centres. The economy has also experienced low unemployment rates since the early 2000s. These factors contribute to a competitive labour market, making it more difficult for agribusiness and related industries to attract the workforce they need.

This strategy is being developed in a dynamic context that includes increased biosecurity risks due to globalisation, the current drought, the bushfires of summer 2019-20 and the long-term effects of climate change and increased climate risk. While droughts are normal for Australia, they are likely to become more frequent, severe and longer in some regions. This will have consequences for agribusinesses and communities in those regions, effecting workforce demand and also on the perceptions of careers in the industry.

FIGURE 1 Factors influencing the agricultural workforce



Several agribusiness and related industries report challenges in recruiting the staff they need. These challenges are fuelling concerns that workforce issues will impede future productivity and growth and will be further exacerbated if socio-economic and demographic trends continue. A productive and ample workforce is needed if the agricultural industry is to grow to $100 billion by 2030.

1.1 The need for a strategic approach

Governments, industry and agribusinesses share responsibility for the agricultural workforce. The strategy provides an opportunity to examine the state of the agricultural workforce, the future workforce needs of the industry and the ability of current government policy settings, industry programs and agribusiness human resource management practices to meet these needs.

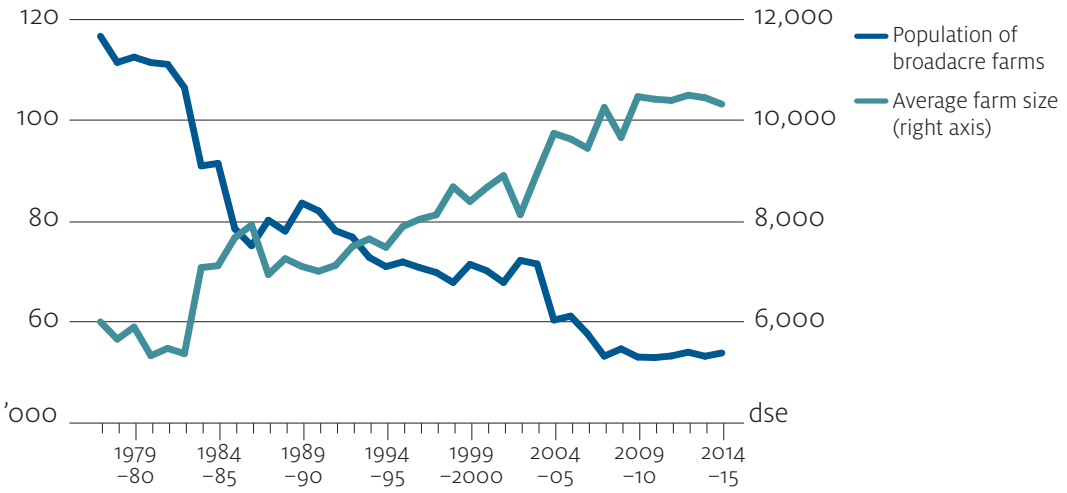
It will not be possible to predict the opportunities that are likely to exist in agribusiness and related industries in the long-term. Instead, the strategy will focus on actions that support the attraction, retention and development of the future agricultural workforce. These actions will also prioritise building resilience to external forces such as weather conditions and natural disasters that can affect agricultural production and have flow-on implications for the workforce, which can be a source of resilience for agricultural businesses (Nettle et al. 2018).

Chapter 2

Effect of changes to agriculture and broader society

The structure of agricultural industries and the organisation and operation of businesses have changed in recent decades. For example, large farms (with receipts above $1 million per year, in real terms) have increased from around 3% to around 16% of the farm population over the past 4 decades (Figure 2 provides an example from the broadacre agriculture sector). The share of output from large farms has increased from 25% to around 60% of the total value of output (Jackson, Zammit & Hattfield-Dodds 2018).

FIGURE 2 Farm population and average farm size, all broadacre industries, Australia 1977-78 to 2014-15



Source: Xia, Zhao & Valle 2017. Note DSE is Dry Sheep Equivalent, a standardised unit for measuring broadacre farm size.

Changes in the structure and organisation of agribusiness and related industries, coupled with technological innovation, have flow-on consequences for the workforce—both in terms of the number of people that work in the industry and the skills they need to have. The nature of work has changed, with increased demand for skilled workers capable of operating sophisticated technologies. Business owners are needing more advanced management skills to manage larger, more complex businesses.

Consumer demands also affect workforce needs and provide potential opportunities for the industry, including through value-adding. For example:

- consumers are seeking fresh fruit year-round. Farmers are responding by adopting greenhouse technology and leveraging different climate conditions to grow high-value crops in a range of areas that can meet this demand, as well as growing a range of varieties to extend growing seasons. These changes will increase demand for more workers unless technology advances substitute these workers
- consumer interest in reducing food waste is creating value-added opportunities for farm products that currently go to waste. This is creating new market opportunities for farmers and supply chain processing businesses that have the skills and knowledge to develop and market these new products.

These changes in the agribusiness and related industries have occurred in conjunction with:

- general internal migration from rural and regional areas—where most primary industries businesses are located—to urban areas (Charles-Edwards et al. 2018; Joyce 2019), decreasing the potential labour pool in some regions. In some agricultural regions, migration of new residents to 'tree change' areas has also changed the available pool of workers, with impacts on cost of living and wage expectations
- the continued ageing of the workforce, which puts downward pressure on domestic labour supply (Brown & Guttmann 2017) and increases competition for available labour
- the growth of the service economy (Adeney 2018), which provides attractive and dynamic job opportunities in competing sectors
- the national competition between industries to attract capable, skilled and talented staff, with relatively few young people choosing agriculture or food industries as a career of choice.

In addition, seasonality of demand, and changes in workforce demand associated with events such as drought, are important influences on the workforce and on ability to recruit and retain workers in the agricultural workforce (Nelson 2012).

2.1 Discussion questions

1 During the next 10 years, what impact will the following changes to agricultural production, processing and distribution have on the workforce:

a. innovation and technological advancement, including robotics and Artificial Intelligence

b. changes to agricultural production—for example, moves to high-value crops and produce, or structural adjustment

c. changes in supply chains and distribution of farm produce

d. changes in consumer demand—for example, end-to-end supply chain traceability as a development of the 'clean and green' brand, provenance and the use of more plant-based ingredients?

2 What will be the effect if agriculture continues to trend towards supplying up-market, premium, and high quality produce, with increasing value-adding manufacturing?

3 What impact will climate change and other environmental situations such as severe droughts, severe storms and long fire seasons have on the agricultural workforce?

4 What ways might changing social perceptions of different agricultural activities (for example, perceptions about sustainability, emissions, and animal welfare) affect the agricultural industry and its workforce?

5 What impact will societal changes, such as the ageing workforce, low unemployment, low immigration and relocation of regional population (and agricultural, health and education workers) to urban areas, have on the agricultural workforce?

a. Are there other societal changes that will affect the agricultural industry and its workforce?

6 What impact does the continuing international corporatisation of agriculture have on labour and jobs?

7 What are key health and wellbeing considerations for the agricultural workforce?

a. How can health and wellbeing best be maintained and improved?

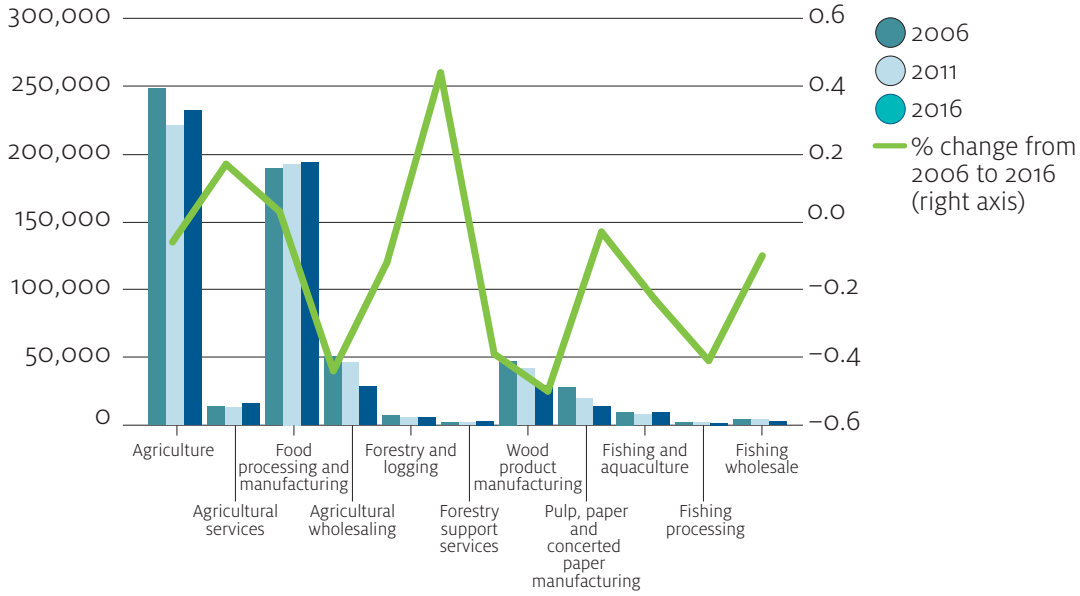
Chapter 3

Availability of workers

3.1 Exit rates increase the demand for new workers

The number of people employed in the agricultural industry has stabilised in recent years, following a period of long-term decline. This decline was driven by a range of influences, particularly increasing production efficiency per unit of labour, which means the number of workers required to produce a given amount of agricultural produce has declined substantially over time. In 2016, 247,595 people were directly employed in the agricultural, fisheries and forestry industries. The number of people working in these industries increased by 5.2% from 234,611 to 247,595 between 2011 and 2016, following a decrease of 11.4% from 264,709 to 234,611 between 2006 and 2011. There are close synergies between the on-farm agricultural industry sector and the supply chain services and processing industry sectors. Total employment in agriculture and related industries, including food processing and manufacturing, was around 536,000 in 2016 (Figure 3).

FIGURE 3 Employment in agriculture and related industries, 2006, 2011 and 2016.



Source: Australian Bureau of Statistics Census of Population and Housing data.

Estimates vary about future growth in the agricultural, fisheries and forestry workforce. The Department of Employment, Skills, Small and Family Business (DESSFB) projects a small decline of 1.2% in employment in these industries between 2019 and 2024 (DESSFB 2019a). In contrast, Shah & Dixon (2018) project an increase of 18% based on the lower value of the Australian dollar and expanding free trade agreements with countries in east Asia. However, this estimate does not consider the effects of the current drought and does not take into account the full contribution of migrant workers. It is important to consider both short-term trends and the impacts of events such as drought, as well as longer-term trends in both skills needs and total labour demand in the workforce (Nelson 2012; Santhanam-Martin & Cowan 2018).

New research by CSIRO (Wu et al. 2019) suggests key influences on the agricultural workforce will be regional development and the adoption of technology advances. This research recognises these factors have varied workforce implications across agricultural sectors and locations.

Regardless of future growth or decline in the agricultural workforce overall, available evidence indicates the industry's workforce needs to be continually refreshed as people leave the industry and need to be replaced and the type of jobs and skill requirements change.

Traditionally, family members have been the main source of labour for farms. However, this is changing. Farm consolidation and corporatisation has resulted in more reliance on labour from outside the family unit, in turn increasing demand for qualifications, training and higher skill jobs such as leading farm hands, supervisors and orchard managers. The move to salaried employees has also increased exit rates in the industry, as salaried employees have higher exit rates than self-employed owner managers (Table 1; Barr forthcoming).

TABLE 1 Agricultural industry exit rates

Skill or responsibility level	Exit rates (per 5 years) 2006-2016
Owner-managers	25% to 30%
High-skill employees	40% to 50%
Low-skill employees	60% to 70%

Source: Barr forthcoming. Note: Industry exit refers to those people that are estimated to have ceased working in the agriculture industry between ABS census years. These people may return to work in the industry at some future time. It does not refer to people who changed jobs or occupations within the agricultural industry.

Some agricultural industries have reported concerns about increasing rates of turnover in their workforce as well as difficulty recruiting new workers (Nelson 2012), and a need to change substantially how workers are recruited to different positions in what are often relatively new career structures for the industry (Santhanam-Martin & Cowan 2018).

3.2 Competitive labour market affecting available workers

Competition for scarce labour is likely to remain a challenge for the industry (OECD 2015). Strong projected growth in other industries, such as health care and social assistance (up by 250,300 or 14.9%) and construction (up by 118,800 or 10%) can be expected to keep the labour market highly competitive and problematic for agricultural employers (DESSFB 2019a). New approaches are needed given Australia's ageing

workforce and intense competition between industries for the same potential and actual workers.

Government and independent reports show that some employers are experiencing recruitment challenges in filling a range of occupations in agribusiness and related industries. These include service industry roles, such as agronomists, veterinarians and automotive and engineering trades, and lower-skilled roles in horticulture, intensive livestock and meat processing (Dufty, Martin & Zhao 2019; DESSFB 2019b; AMPC 2018; APL 2017).

3.3 Ensuring availability of agribusiness workers

A range of factors affect the appeal of jobs in agribusiness and related industries and whether people want to stay working in these industries. These factors include people's personal interests and capabilities, perceptions of the occupations and their status, the work available and the stability of pay and conditions, and competition from other industries.

Industry and governments have invested in agriculture-related teaching material to increase positive exposure to agriculture and agricultural careers in schools. Agriculture features in the Australian curriculum through the food and fibre theme; however, it is up to individual schools and teachers to decide what content they use to deliver the curriculum (ACARA 2017). It is not clear if exposure to agriculture in schools has a lasting effect on student career interests (Bray & Cay 2018).

Targeting interventions to where they are most effective is a key consideration. More investment in school materials needs to be compared with approaches aimed at strengthening agricultural career advice or programs to support the transition from secondary school to work.

3.4 Discussion questions

The contribution made by salaried staff to the on-farm agriculture industry workforce is increasing due to the growth of corporate-style business models and large family farms. This creates staff recruitment and training challenges that do not exist under traditional owner-operator business models.

8 What are the key drivers that will influence the size and skill needs of the agricultural workforce in the next decade?

9 What factors (e.g. status of the agricultural industry compared to other industries, competitive labour market, workplace conditions, public perceptions of agricultural jobs and industries) impact the pool of talent available to pursue agricultural careers?

- **a.** How can these factors be mitigated?

10 How can agribusinesses and related industries better attract workers?

- **a.** What factors affect entry into the agricultural workforce? How can the agricultural industry achieve greater exposure?
- **b.** Why do people leave the agricultural workforce? How can these factors be mitigated?

11 What are the implications if the supply of skilled agricultural workers is insufficient for your sector or business?

Chapter 4

Skills and knowledge

Historically most farm workers have acquired skills through on-the-job learning and targeted short courses of study (NFF 2019). This may need to change given technological changes and the growing need for complex management skills in the sector (Pratley & Archer 2017). Formal education and training has a stronger history in some related service and supply chain industries, such as the advisory and trades sectors. Currently however, an international and national trend across many education disciplines indicates a preference for targeted, short course credentials, which may also be more suitable in agriculture.

There is a general consensus among researchers that technological developments will be a key driver of the future workforce needs of the agricultural industry (Houghton 2019; Regional Australia Institute 2018; Pratley 2017b; Leonard et al. 2017) and the broader economy (World Economic Forum 2019; Taylor et al. 2017; Hajkowicz et al. 2016). This trend is already being felt. There is a need to ensure a close relationship and alignment between the future workforce skills need and the informal, vocational and tertiary education offerings that are available. Formal training is one of many pathways to entering a career in agriculture, with many people transitioning from careers in other industries into agriculture, and sometimes back out of agriculture, highlighting the importance of understanding all pathways into the agricultural workforce rather than assuming a linear or single pathway via formal training (Santhanam-Martin & Cowan 2018).

While the portion of the agricultural workforce with tertiary qualifications has increased over the past decade, the prevalence of such qualifications is lower than in the general Australian workforce. The results of Australian Council of Deans of Agriculture's longitudinal study of agricultural graduates showed a decline in graduate numbers in agriculture and related courses from around 1,300 in 2001 to around 550 in 2014. Enrolments (the total number of students across all years studying such courses) declined from 4,300 in 2001 to a low of less than 2,300 in 2012 increasing to 2,500 in 2014, with student intake data suggesting the increase to continue in the medium term (Pratley 2017a).

Participation in agricultural vocational education and training has fallen in recent years—with university enrolments down by more than 40% from 2009 to 2014 and vocational enrolments down by 23% from 2015 to 2018 (NCVER 2019).

There is a small market for tertiary education in agriculture, especially for specialist courses or degrees. Due to Australia's size, demand for some courses is diffuse and may not be readily apparent to providers. This can lead providers to cease providing

these courses. Employers, industry representative bodies and Rural Research and Development Corporations can play a role in aggregating this demand and working with universities and vocational education and training providers to redesign existing courses or establish new courses required by the market.

The agricultural industry has a strong history of providing industry extension training and advice services, which are increasingly delivered by the private sector. These services operate outside formal education structures and include a range of services—for example, short presentations by advisers or researchers, field days, business benchmarking, one-to-one advice on animal health or business management (for example Box 2). Services are likely to become more important in disseminating technological advancement, research outcomes and production innovations (Nettle, La and Smith 2018).

Box 2 Extension and advice services

Australian Mungbean Association certified agronomist training

The Australian Mungbean Association, in conjunction with Queensland Department of Agriculture and Fisheries and Pulse Australia, conducts upskilling courses for agronomists. These courses provide agronomists with the technical knowledge and practical skills required to assist growers achieve more reliable and profitable mungbean production. The certification consists of:

- two-day technical workshops addressing the key issues identified by the industry as the main prerequisites for more reliable and profitable mungbean production
- detailed in-field monitoring of at least 2 commercial mungbean crops, where the agronomists must demonstrate that they can apply the technical skills and processes covered in the initial workshop. this is the auditable component of the course and the main prerequisite for certification
- in-crop training sessions on insect-scouting techniques and management, and disease diagnosis
- ongoing technical support on current research and reassessment of best management practices for the mungbean industry. the network of certified agronomists is also kept informed of any emerging issues within the industry, such as new pesticide registrations or permits.

Private Forests Tasmania (PFT)

Private Forests Tasmania is a government authority with a legislated role to facilitate and expand the development of Tasmania's private forest resource in a manner which is consistent with sound forest and land management practices. PFT supports private forest owners by responding to their enquiries organising field days and market forums, development of planning tools and information services. The functions of Private Forests Tasmania are partially supported through a levy paid by private forest growers based on the net area of a forest operation permitted pursuant to the certification of a forest practices plan by the Forest Practices Authority.

Each year, more than 850 people contact PFT for assistance and advice on a range of matters relating to their forests or forestry in general. The type of assistance provided varies - ranging from verbal advice over the phone to field inspections that may take half a day, or more, often with further follow up required.

Source: AMA 2019, PFT 2019.

In addition to technical courses and advisory services, a range of unaccredited training courses are provided in the area of industry leadership and personal development (for example Box 3). These courses typically exist outside formal education structures, including the Australian Qualifications Framework. However, there are some examples of moving towards more structured outcomes, such as Hort Innovation's Global Masterclass program—which results in a Diploma in Horticultural Business.

Box 3 Leadership case studies

Young Dairy Network Australia

The Young Dairy Network Australia (YDNA) is a project of Dairy Australia that works across the regions to support local networks of young dairy farmers and employees. Since it started in 2013, 2,500 young people have taken part in the initiative. YDNA aims to support the next generation of young people in dairy to advance within the industry, building capabilities in strategy and innovation.

YDNA also provides support for young people to attend major industry events and assists in the delivery of leadership programs to the industry. Through YDNA, young people can:

- participate in activities including farm walks, workshops, leadership programs and tours
- get involved in running a network and gain skills in leadership and organisation
- attend national dairy events
- connect with young farmers from other regions.

Fisheries Research and Development Corporation National Seafood Industry Leadership Program (NSILP)

The ability to build leadership capability and enhance existing leadership capacity is a key focus for the Australian fishing and seafood industry organisations and businesses. 1 – 2 cohorts of up to 18 participants each year pass through the NSILP, which consists of a nine day course in the development of various leadership skills relevant to fishing and aquaculture in Australia. The NSILP commenced in 2000 and has more than 250 graduate alumni that incorporate representatives of most industry sectors including individuals and organisations from indigenous, recreational, aquaculture and wild-caught sectors of the Australian seafood industry and community.

Source: Dairy Australia 2019; FRDC pers. comm.

4.1 Discussion questions

The composition and skills needs of the agricultural workforce are expected to continue to change. These changes are likely to increase the industry's requirement for workforce education and training.

12 What skills and knowledge does the agricultural workforce need in the foreseeable future to ensure the ongoing productivity of the agricultural industry given the changes the industry and Australia is experiencing?

13 Is the current education and training system for agricultural workers fit for purpose? Are the needs of the agribusiness workforce adequately served by current education and training systems (high school programs, vocational education and training, and higher education)?

a. What is working? What is not?

b. How can these systems best meet the needs of the agricultural workforce?

c. What changes might be required to accommodate the different learning style of younger generations of people?

14 What skills and knowledge do business owners need and how can this be best achieved (formal education or informal education and different modes of delivery, for example micro-credentials, online learning, workplace learning)?

Chapter 5

Opportunities, best practice and priorities

The agribusiness workforce is undergoing changes and faces several impediments—the need to replace a significant portion of the workforce regularly, a competitive labour market, status and perception issues, and a workforce that has traditionally been skilled outside formal tertiary education structures.

Additionally, challenges such as drought, fire, flood and others can have rapid impacts on agricultural workforces in specific regions, and create challenges for the labour force that can be relatively long lasting. Building resilience into the workforce to enable maintenance of an agricultural workforce through periods of higher and lower production in the industry is a critical part of planning for resilient futures for the agricultural workforce.

A sufficient and productive workforce, both on-farm and in related service and processing industries, will be needed if the agricultural industry is to grow to $100 billion by 2030. Now is an opportune time to reconsider whether the systems and policy settings in place will be able to provide the workforce needed going forward.

Responsibility for workforce issues is shared. Governments are responsible for levers that influence the supply of workers, including formal education settings and public funding of education, workplace relations legislation and migration settings. Industry, government and businesses are responsible for ensuring the agricultural industry is perceived positively, attracting and retaining workers, ensuring favourable working conditions and building a sustainable, resilient workforce. In many economies close enduring partnerships between government, industry and academia—the powerful 'triple helix'—are essential for building and maintaining relevance, and a sustainable workforce.

The Australian Government has signalled its ongoing commitment to supporting regional employers by enacting several changes to migration and visa settings to support the agricultural industry to access migrant workers. For example, 2 new skilled regional provisional visas were introduced in November 2019 and a range of improvements have been made to the Working Holiday Maker visa program, the Seasonal Worker Programme and the Pacific Labour Scheme to help farmers' access seasonal harvest labour.

The exploitation of migrant workers is a serious issue. Migrant workers are entitled to the same basic rights and protections as Australian citizens and permanent residents under applicable Australian workplace laws and receive the same protections as Australians in terms of investigating claims of underpayment and exploitation. As part

of its continuing efforts to address this issue the Australian Government is implementing the recommendations of the Migrant Workers' Taskforce, including:

- establishing a Migrant Workers Interagency Group to progress the whole of government implementation of the Taskforce recommendations
- providing additional funding for the Fair Work Ombudsman to enhance its capacity to conduct investigations and improve migrant workers' understanding of their workplace rights
- progressing the development of a National Labour Hire Registration scheme to cover high-risk sectors.
- together with the horticulture industry's Fair Farms Initiative and the implementation of the Modern Slavery Act 2018, these measures serve to reinforce our regulatory arrangements to further safeguard workplace conditions and thus protect the premium position of the Australian agricultural industry in domestic and export markets.

The Australian Government is also committed to regional education and improving education settings. New education and training initiatives underway or under consideration that have implications for the agricultural workforce include:

- the expert review into vocational education and training, led by the Hon. Steven Joyce. The Australian Government released its response, *Delivering Skills for Today and Tomorrow*, on 2 April 2019, and is working with state and territory governments to implement recommendations
- the Independent Review into Regional, Rural and Remote Education, conducted by Professor John Halsey between March 2017 and April 2018. The government released its response in May 2018. Key initiatives included expanding accessibility of sub-bachelor programs at regional institutions and accessibility for bachelor students at regional study hubs, and improving access to Youth Allowance for regional students
- the development of the National Regional, Rural and Remote Education Strategy, led by the Regional Education Expert Advisory Group, which builds on the government's response to the Halsey Review. The strategy proposed 7 recommendations focused on improving the participation and outcomes of regional, rural and remote students in post-secondary education. The government is yet to announce its response to the strategy.

5.1 Discussion questions

Governments, industry and agribusinesses share responsibility for the agricultural workforce. A successful strategy will rely on this shared responsibility as well as identifying what works, what the priorities are, leveraging best practice and taking advantage of opportunities.

The committee is interested in learning about best practice examples, opportunities to improve existing programs, and what actions are likely to be most effective and should be given priority.

15 What initiatives have worked to raise the status of agribusiness, increase the supply of workers or increase the skills and knowledge of agricultural workers? What factors have contributed to the success of these initiatives?

a. Specifically, are you aware of examples of collaboration between employers, education providers and regional communities? Which intermediaries supported these collaborative arrangements?

16 What existing education, training, workforce or other relevant initiatives can be leveraged to support agribusinesses workforce needs?

17 How can existing government programs be improved to better support agribusinesses and related industries workforce needs?

18 How consistent across agriculture and horticulture is the need for more and targeted immigration to sustainably increase the national agriculture labour pool and support national capability and capacity building?

19 Will the actions taken or committed to by governments and industry address concerns about workplace exploitation given time?

20 What should be done in the short (1 year), medium (2 to 3 years) and long term (5 to 10 years) to improve the productivity and resilience of the agribusiness workforce? Of these actions, what are the top 3 priorities?

Chapter 6

Submissions and next steps

Developing a National Agricultural Workforce Strategy requires a collaborative approach and commitment from relevant Commonwealth and state and territory government agencies, industry bodies and the private sector.

We invite you to contribute suggestions to guide the development of the strategy.

6.1 Have your say

We want to hear from you. All interested stakeholders wishing to have their views considered on how to ensure the agricultural workforce is future-ready are invited to provide a submission.

All submissions and comments, or parts thereof, will be treated as non-confidential information unless specifically requested.

Respondents lodging submissions should be aware that submissions may be made publicly available and will be subject to freedom of information provisions. Despite a submission being identified as confidential, submissions may be disclosed where authorised or required by law, or for the purpose of parliamentary processes.

Questions raised in this discussion paper are intended as a guide only. Respondents are welcome to provide more general comments.

Submissions close on 1 June 2020.

Join the national conversation. Go to *haveyoursay.agriculture.gov.au/national-agricultural-workforce-strategy*.

6.2 Next steps

The advisory committee will consider all submissions. Your ideas will help them identify ways to develop the National Agricultural Workforce Strategy.

6.3 Contacts

For further information about the National Agricultural Workforce Strategy, please email: **agricultural.workforce@agriculture.gov.au**.

Appendix A

National Agricultural Labour Advisory Committee-Terms of reference

Purpose

The purpose of the National Agricultural Labour Advisory Committee (the committee) is to help progress the National Agricultural Workforce Strategy (the strategy) and to advise the Government on farm labour and agricultural sector workforce challenges. The strategy provides the opportunity to comprehensively assess the workforce needs of the agriculture industry.

Scope

The committee will:

- prepare the strategy, including considering and examining:
  - the current and expected future agriculture industry workforce and skill needs
  - the current and expected demand and supply of labour for the agricultural supply chain to meet future agriculture industry workforce and skill needs
  - the effectiveness of current education and training arrangements, including programs designed to promote agricultural careers to students, at meeting the agriculture industry's workforce and skills needs
  - best practice examples and case studies of agricultural workforce development and potential innovative approaches aiming to deliver better outcomes
  - the outcomes from any other relevant reviews, consultation to date and inputs made by industry groups.
- as requested by government, provide specialist advice on farm labour and agricultural sector workforce challenges.

Note: 'agriculture industry' includes the agriculture, fisheries and forestry industries and their closely allied service and supply chain industry sectors.

Background

The Australian agriculture industry is changing, including through:

- the adoption of technologically advanced equipment and techniques
- the emergence of internationally competitive industry and business structures
- production changing to favour regions or products that are competitively advantaged
- a trend towards supplying premium food and fibre products.

At the same time as these changes are occurring, research suggests there is a lack of understanding about career prospects in the industry. There are also concerns about the ability of current education and training initiatives to upskill the industry workforce in response to the changes listed above.

The situation is dynamic. Responsibility for developing the agricultural workforce is shared between a suite of Commonwealth and State and Territory Government agencies, industry representative and private sector stakeholders. Workforce development initiatives undertaken by these groups confront opposing forces from environmental, economic and social factors, such as drought or poor commodity prices.

The strategy will recommend potential actions to address the agriculture industry's future workforce needs. These actions will target school education, vocational education and training and higher education to attract, retain and upskill the domestic workforce and identify where access to a migrant workforce will be necessary to meet the industry's workforce needs.

Membership

The committee will be chaired by an independent chair and up to 12 other members with relevant skills and experience in agriculture, fisheries or forestry industries, related agricultural supply chain industries, education and training and/or the future of work.

Other external experts and participants may be invited by the chair to discuss particular agenda items.

Consultation

National consultation will be undertaken to inform the development of the strategy. The committee will decide on the details of the consultation required to develop the strategy.

Operation

Unless otherwise arranged, the committee will meet at least three times to support the development of the strategy, which is expected to take nine months to complete. There will be flexibility in whether meetings are conducted in person or by other means such as teleconferencing.

The committee will develop a work-plan to address the Terms of Reference. This could include commissioning expert advice or other assistance, if required.

Reporting

The committee will report the outcomes and advice from the meetings to the Minister for Agriculture, Drought and Emergency Management. Once completed, the strategy will be submitted to the Minister for Agriculture and then published.

Secretariat

The Department of Agriculture, Water and the Environment will provide secretariat and administrative support for the committee.

Funding

The activities of the committee and the secretariat will be funded by the Department of Agriculture, Water and the Environment.

Term

The committee is expected to operate for up to two years.

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