



## Civil Contractors Federation - National Skills and Capacity Survey 2021

### Introduction

Civil Contractors Federation National ('CCF National') is the peak employer voice for the civil construction industry representing 1,900 companies across Australia. CCF members are responsible for the construction and maintenance of Australia's civil infrastructure including road, bridges, pipelines, drainage, ports and utilities. With offices located in every capital city we advocate for the industry at Federal, State / Territory and local Government levels.

CCF members include tier 1, 2, 3 and below civil construction companies ranging in size from 1-4 employees up to 200+ employees. CCF National advocates for a number of key civil infrastructure policy reforms. These reform 'pillars' are critical to positioning the industry to meet future infrastructure demand and to support national economic growth. The five policy pillars are:

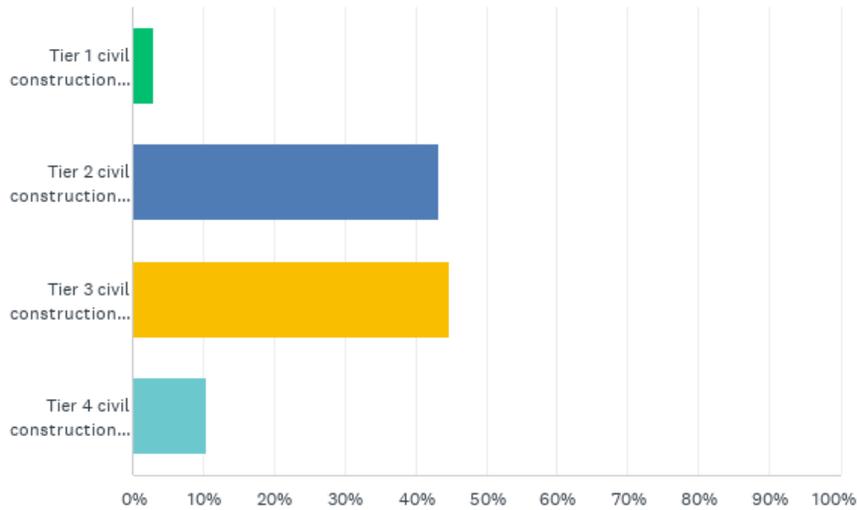
1. Sustained level of long-term Infrastructure Investment
2. Efficient, Equitable and Competitive Procurement
3. Enhancing Skills Development & Training
4. Enhancing Industrial Relations
5. Building a Stronger, More Sustainable Industry

### Survey

A total of **87 companies** took part in a survey developed by CCF National to obtain feedback and data on the skill needs and capacity of CCF members. The survey was held over a four-week period in October / November 2021. The survey focuses on members' capacity to tender for additional projects, key civil occupation shortages the reasons for those shortages and their expectations for the future.

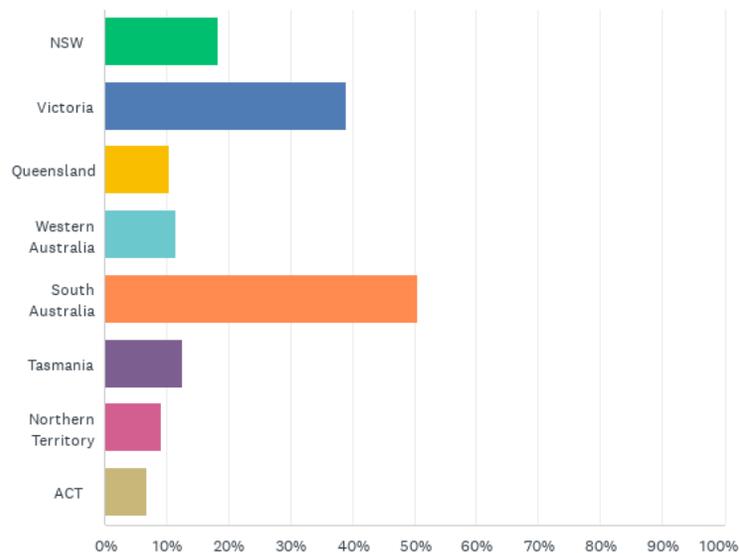
CCF National is pleased to provide the results of this survey to help industry and government better understand industry's capacity now and into the future, and the steps needed to ensure there are sufficient skilled workers in the civil construction sector to support a thriving and sustainable industry that will lead Australia's economic recovery

## 1. What classification best describes your company?



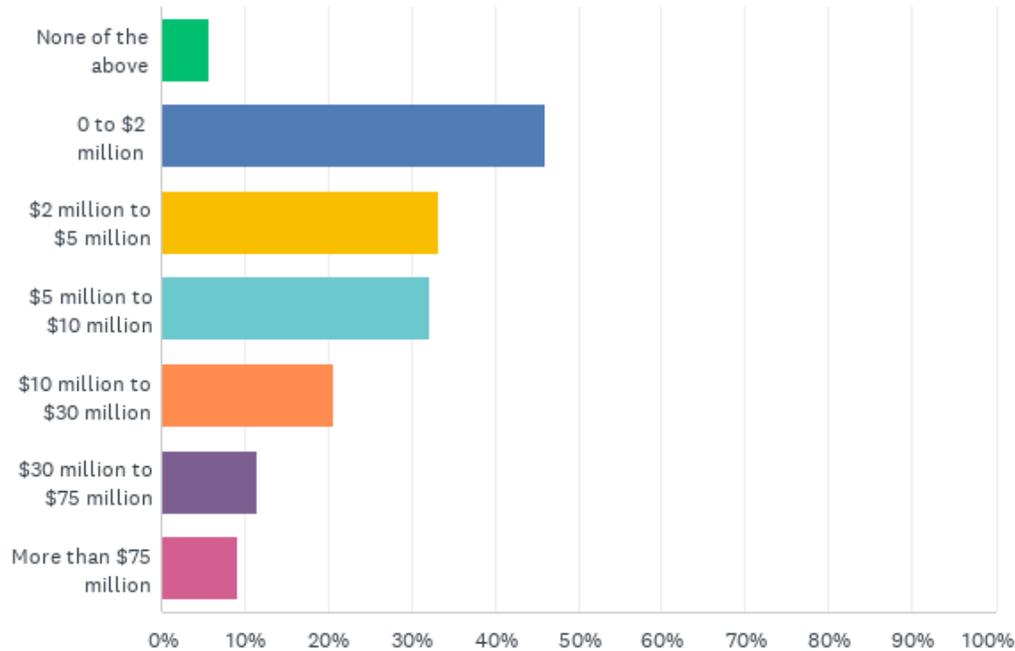
Of the companies who responded to this question, more than 87% described themselves as a tier 2 or tier 3 civil construction company. Around 10% described themselves as a tier 4 civil construction company, while 3% are a tier 1 civil construction company.

## 2. In which state or territory do you operate, including multiple states?



There was a wide geographic spread of survey respondents, with a majority originating from South Australia, Victoria and New South Wales.

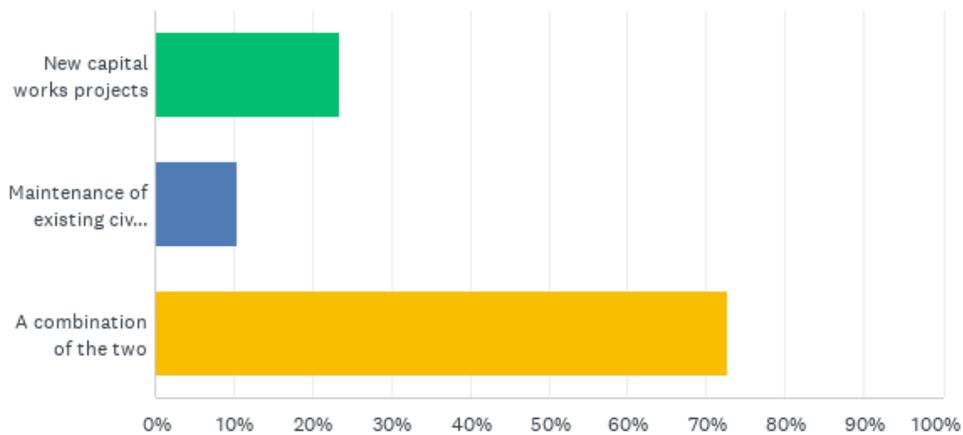
### 3. Does your business have capacity to tender for additional civil infrastructure projects? If so, which threshold level would your business have capacity to tender for?



This question had a 100% response rate, with 87 companies providing feedback on their capacity to undertake additional civil infrastructure projects. Like previous CCF surveys, the results demonstrate additional capacity within the civil construction industry, particularly for small to medium sized products. A total of 95% of respondents indicated that they have capacity to tender for additional civil infrastructure projects, with 45% indicating they can tender for projects between the 0-\$2 million threshold, 33% can tender for projects between the \$2 million -\$5 million threshold and 32% for projects between the \$5 million and \$10 million threshold.

ANSWER CHOICES	RESPONSES
None of the above	5.75% 5
0 to \$2 million	45.98% 40
\$2 million to \$5 million	33.33% 29
\$5 million to \$10 million	32.18% 28
\$10 million to \$30 million	20.69% 18
\$30 million to \$75 million	11.49% 10
More than \$75 million	9.20% 8
<b>Total Respondents: 87</b>	

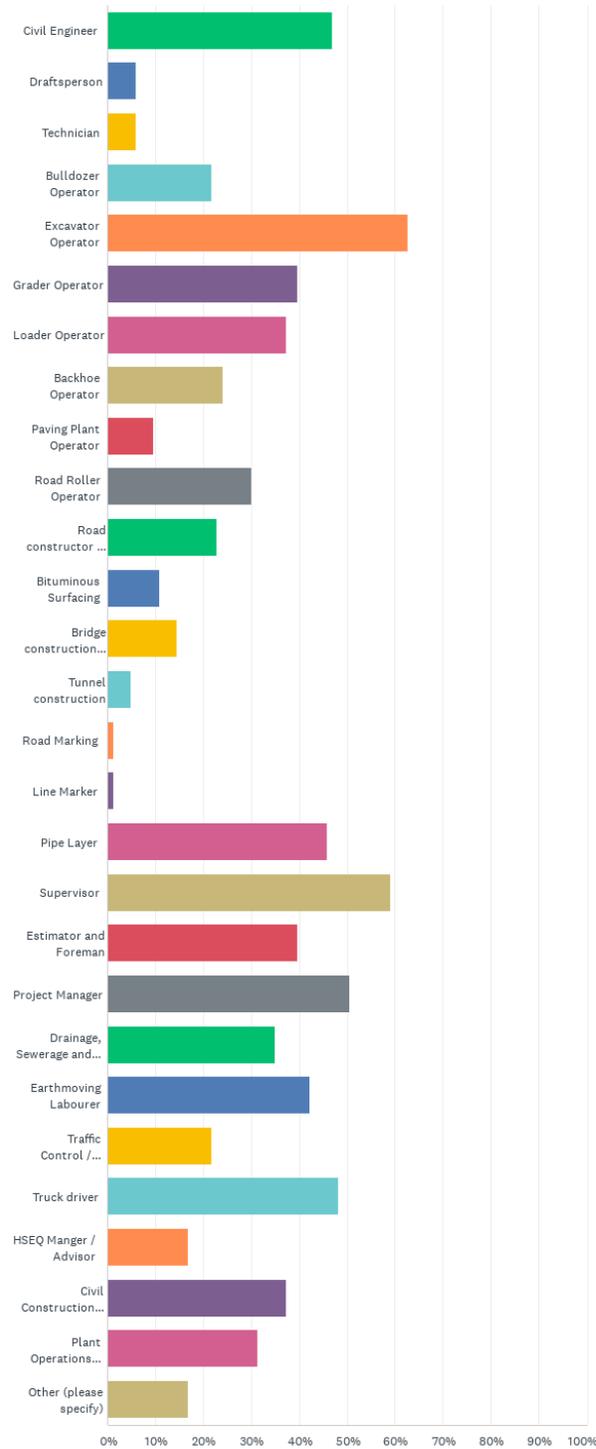
#### 4. What types of projects do you specialize in?



This is the first time this question has been asked in our member surveys as CCF was keen to understand the type of work our members undertake. Nearly two thirds of respondents (72%) undertake both new capital projects and maintenance of existing civil infrastructure. Feedback highlighted rail maintenance, footpaths, bridges, new sub-divisions and bulk earthworks as some of the civil construction works performed.



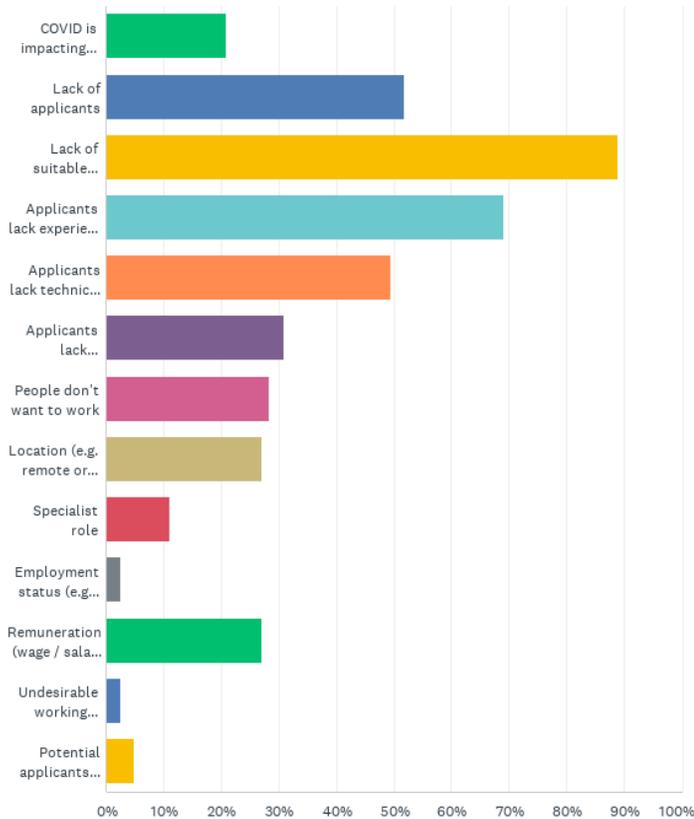
## 5. Do you have a need for the following resources in your business?



Respondents were presented with 27 common civil construction occupations and were asked which ones they had a need for. The occupations in highest demand are Excavator Operator (62%), Supervisor (59%), Project Manager (50%), Truck Driver (48%), Engineer (46%) and Pipe Layer (45%). The least in demand are road marking (1%), line marking (1%), draftsman (5%) and technician (5%).

ANSWER CHOICES	RESPONSES	
▼ Civil Engineer	46.99%	39
▼ Draftsman	6.02%	5
▼ Technician	6.02%	5
▼ Bulldozer Operator	21.69%	18
▼ Excavator Operator	62.65%	52
▼ Grader Operator	39.76%	33
▼ Loader Operator	37.35%	31
▼ Backhoe Operator	24.10%	20
▼ Paving Plant Operator	9.64%	8
▼ Road Roller Operator	30.12%	25
▼ Road constructor and maintenance	22.89%	19
▼ Bituminous Surfacing	10.84%	9
▼ Bridge construction and maintenance	14.46%	12
▼ Tunnel construction	4.82%	4
▼ Road Marking	1.20%	1
▼ Line Marker	1.20%	1
▼ Pipe Layer	45.78%	38
▼ Supervisor	59.04%	49
▼ Estimator and Foreman	39.76%	33
▼ Project Manager	50.60%	42
▼ Drainage, Sewerage and Stormwater Labourer	34.94%	29
▼ Earthmoving Labourer	42.17%	35
▼ Traffic Control / Managers	21.69%	18
▼ Truck driver	48.19%	40
▼ HSEQ Manger / Advisor	16.87%	14
▼ Civil Construction Apprentices / Trainees	37.35%	31
▼ Plant Operations Apprentices / Trainees	31.33%	26
▼ Other (please specify)	Responses 16.87%	14
<b>Total Respondents: 83</b>		

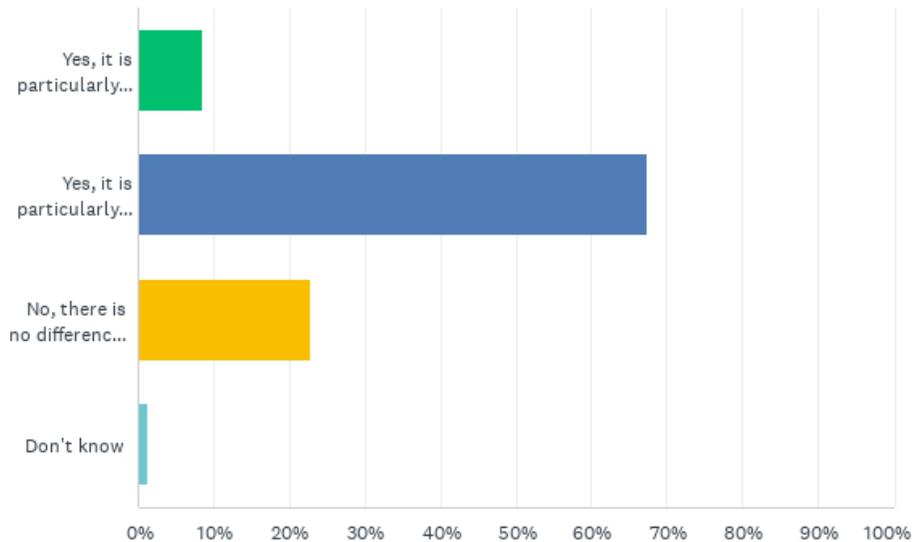
## 6. Why do you find it difficult to recruit for these occupations?



A total of 88% of respondents said a lack of suitable applicants is the primary reason why they find it hard to recruit for these positions. 69% of respondents said applicants lack experience. COVID was ranked ninth out of 13 (17%).

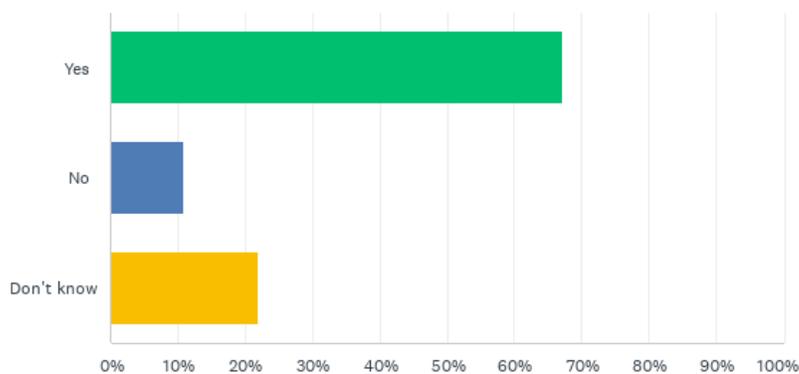


### 7. Do you find it difficult to recruit for entry level or experienced positions within these occupations?



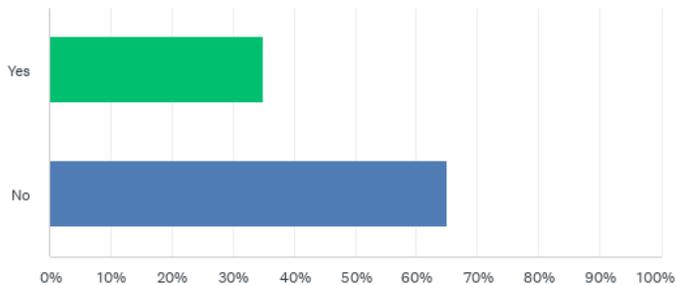
Two thirds of respondents (66%) said it is particularly hard recruiting experienced workers. Only 7% said it was particularly hard recruiting for entry level positions.

### 8. If civil occupations (and subsequently your organisation) qualified for Vocational Education and Training funding would this assist or contribute to your recruitment activities?



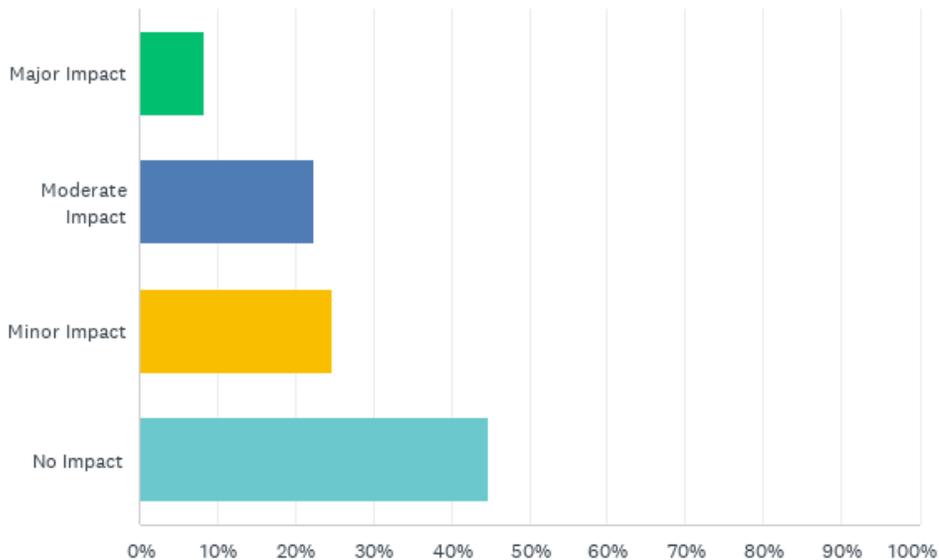
More than two thirds of respondents (67%) agreed that their recruitment efforts would be assisted if civil occupations qualified for VET funding, reaffirming and validating CCF National’s advocacy for key civil occupations to be included on the National Skills Needs List.

### 9. Does your workforce include skilled migrants?



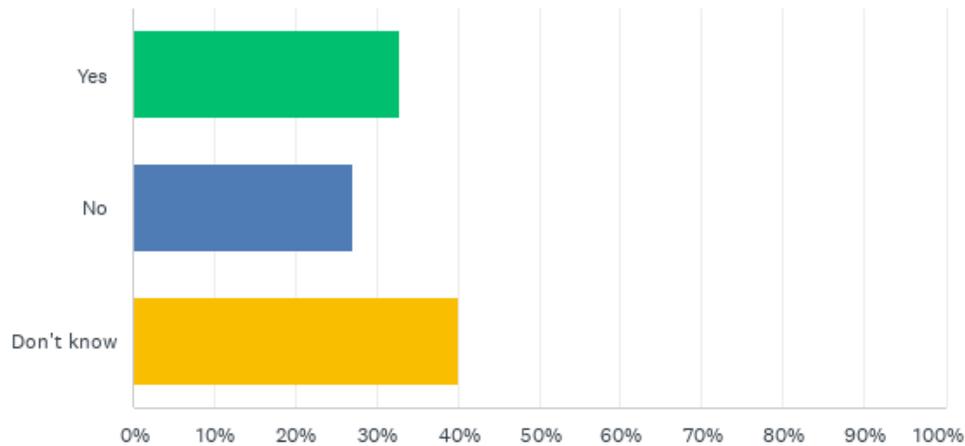
Only around a third (34%) use overseas skilled migrants. Of those companies who do, nearly half said they employ engineers from overseas.

### 10. How severe has the closure of Australia’s international borders affected your labour supply?



The closure of Australia’s borders has not had a major impact on the Australian civil construction industry, with 44% saying it has had no impact, while a quarter (24%) saying it has had a minor impact. Less than 10% said it has had a major impact.

### 11. When Australia opens its international borders to skilled migrants will this assist your employment needs?



Around a third of respondents (32%) said Australia’s border re-opening would assist their employment needs.

### Conclusion

The National Skills and Capacity Survey 2021 reinforces CCF National’s recommendations to Government to enhance skills development and training, and for ongoing spending to be targeted at tier 2 companies and below given they have additional capacity to tender for additional infrastructure projects. They also add much needed balance to the argument that Australia’s infrastructure market is operating at “full capacity”. While this may apply to some sectors of the civil construction sector and in some geographic areas, this survey demonstrates it does not apply to the entire civil construction sector, particularly those operating at tier 2 and below. Given the results of this survey, CCF National presents the following five recommendation for consideration and adoption by the Federal Government to help build and sustain a highly skilled civil infrastructure workforce, and to improve industry sustainability.

### Recommendations

- All levels of Government must equitably distribute projects and funding across all states and territories and disaggregate large infrastructure projects to maximise participation of tier 2, 3 and below contractors.

- Procurement agencies need to retain and employ appropriately qualified and sufficient numbers of procurement staff commensurate with the procurement workload to ensure timely and streamlined tender processes.
- The Federal Government must include key civil construction occupations on the National Skills Needs List as a matter of urgency. This is to ensure that employers, employees and registered training operators are eligible for relevant Commonwealth financial incentives.
- The Australian and New Zealand Standard Classification of Occupations (ANZSCO) Codes need to be changed to recognise relevant civil streams. In particular, CCF is calling for civil construction apprenticeships to be recognised with other trades under main ABS Group 3 'Technicians and Trade Workers'.
- The Federal Department of Education, Skills and Employment should establish a stand-alone Civil Infrastructure Cluster as part of the proposed Vocational Education and Training (VET) reforms. An alternative, albeit a less preferred option, is including Civil Infrastructure in the Mining, Resources and Energy Skills Cluster and renaming it 'Mining, Resources, Infrastructure and Energy'.

All enquiries regarding this report can be directed to:

**Christopher Melham**

Chief Executive Officer

E: [ccfnat@civilcontractors.com](mailto:ccfnat@civilcontractors.com)

P: 02 6273 8312

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