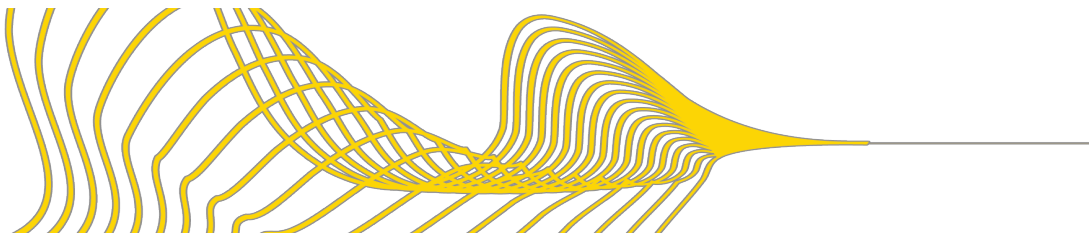


Environment Scan – 2012



Business Services Industry



Acknowledgements

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About this report

The Escan provides Innovation & Business Skills Australia (IBSA) with an opportunity to gather industry intelligence on business directions and emerging workforce development issues and to consider them in light of statistical information on training and industry trends. The Escan examines the key skilling challenges facing the Business Services industry.

The Escan is also provided as advice to assist Government consideration of the industry skills and workforce development investment priorities for Australia's Vocational Education and Training (VET) system. The Escan will also be of interest to other audiences including Registered Training Organisations (RTOs) in working with industry to develop and implement strategies to build workforce skills and productivity.

This industry Escan accompanies and underpins IBSA's principal Escan 2012: Securing future workforces and references data from the Australian Bureau of Statistics (ABS), IBISWorld and the National Centre for Vocational Education Research (NCVER). Industry intelligence, gained from annual Escan consultations, is a vital element in development of this Escan. The research methodology used to prepare the report is explained in more detail in Appendix A.

Terms:

Terminology used to describe occupations and industry sectors varies across jurisdictions and different parts of the industry. In the interests of readability this report has adopted the following terms:

1. Industry – refers to the IBSA industry grouping that this Escan report covers, ie Business Services
2. Sector – refers to the segments that make up the IBSA industry grouping that this Escan report covers, ie data processing services, employment placement services, advertising services, market research services, management consultants and legal services, and
3. Tertiary – is the post-secondary learning sector that includes VET and higher education.

Disclaimer

IBSA has produced this Environment Scan as a resource for its stakeholders without any form of assurance. While IBSA aims to provide high quality content, it does not guarantee the accuracy of this information and therefore will not be liable in any capacity for damages or losses to the user that may result from the use of this information.



Australian Government

**Department of Industry
Innovation, Science, Research
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Chapter 1 – Executive summary

The Business Services Industry encompasses many different categories of operations, all of which provide services to fellow businesses. The services covered by this Escan include:

- Customer contact
- Human resource management
- Market research
- Advertising and public relations
- Legal services
- Data collection, hosting, processing, management and analysis – including cloud computing, and
- Management consulting.

While these functions are woven through all businesses in all sectors of the economy, this Escan focuses on those organisations that are contracted by other businesses to provide these functions.

It is estimated that 87 percent of Business Services enterprises are small to medium businesses. The performance of the Business Services Industry is closely tied to the performance of the economy as a whole. If businesses have the money to spend on services, the Business Services Industry does well and vice versa. The global downturn had a negative impact on the industry but as the overall economy recovers, the Business Services Industry is also expected to bounce back. The resources boom has boosted several sectors in the industry and strong growth is predicted over the next five years as long as volatility on global markets does not drag on; and business and consumer confidence and the Chinese economy remain strong.

For the Business Services Industry high level skills and leadership skills at all levels are expected to be increasingly in demand as businesses aim to develop and deploy superior management practices to increase innovation and productivity. Overlaps amongst sectors within the industry mean that employers will be demanding a mix of skills from different disciplines and a stronger focus on generic, transferable skills. Skills in communication and relationship management are expected to be particularly important as routine tasks move off shore and businesses seek to increase their client base by providing premium, customised services.

Employers, particularly small businesses, may be looking to build their digital literacy to take advantage of opportunities that will come with the National Broadband Network. They may also be looking for assistance to understand how to plan for and invest in workforce development. With growing competition for skilled labour, businesses in this industry may need to consider how they can appeal to, recruit and provide skilling opportunities for different groups of workers including young people, Indigenous people and people with a disability.

In responding to the need for higher level skills there has been a noticeable increase in enrolments in higher level Certificate III, IV and Diploma level qualifications. There has been particularly strong growth in 2010 in the Diploma of Management. Customer contact industry qualifications are also growing strongly.

The key workforce development challenges facing the Business Services Industry in 2012 include:

- Developing management and leadership skills at all levels in organisations
- Offering opportunities to undertake higher level vocational skills
- The blurring of industry and occupational boundaries creating occupational and skills convergence
- The growth of social media demanding higher levels of digital literacy across occupational groups and industries

- The need for business, particularly small business, to work with facilitators to identify and plan for workforce development, and
- Widening the recruitment pool by making learning opportunities available to all individuals.

Given the workforce development priorities of the industry, the following issues require particular consideration by IBSA and RTOs:

- The feasibility of developing of a graduate vocational qualification in business to cater for the large cohort of students who already have diploma or degree level qualifications and to pick up on the strong demand by industry for higher level skills, particularly in business management, analysis and marketing and sales, and
- Ensuring employability skills and leadership skills are integrated into, and effectively delivered and assessed in, business qualifications at all levels and that the transferability of these skills is highlighted in teaching.

Chapter 2 – Industry intelligence

The Business Services Industry

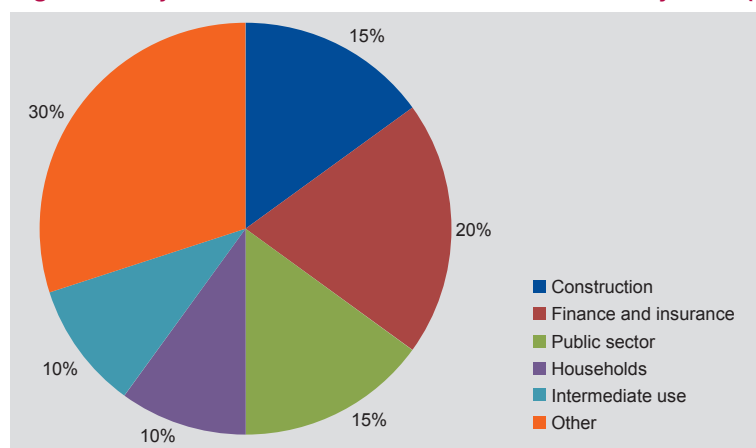
The Business Services Industry encompasses many different categories of operations, all of which provide services to fellow businesses across the economy, including:

- Customer contact – call centres or contact centres that are dedicated to interacting with customers, the public and employees via a phone or technology interface on behalf of clients
- Human resource management – businesses that match people in need of jobs – temporary or permanent – with companies in need of qualified employees; assist with processing employees; and/or provide advice on staffing matters
- Marketing management and research – business that provide new business branding and marketing along with data capture and analysis
- Advertising and public relations – businesses that create and place promotional material across a range of media
- Legal services – businesses that deal with business transactions and/or provide litigation services, such as solicitors, barristers and legal aid services
- Data collection, hosting, processing, management and analysis – businesses that provide electronic data services against business metrics to support planning activities, and
- Management consulting – businesses that provide specific expertise that businesses cannot undertake themselves, including professional, scientific, technical, management and strategy consulting.

Many of these functions are woven through all businesses in all industries; however this Escan focuses on those organisations that are contracted by other businesses to provide these functions.¹

Major markets for these services include large financial services companies, construction companies as well as governments and other public sector organisations. In fact, these three industries jointly provide half the revenue for the Business Services Industry.

Figure 1: Major markets for Business Services Industry 2011 (% revenue)



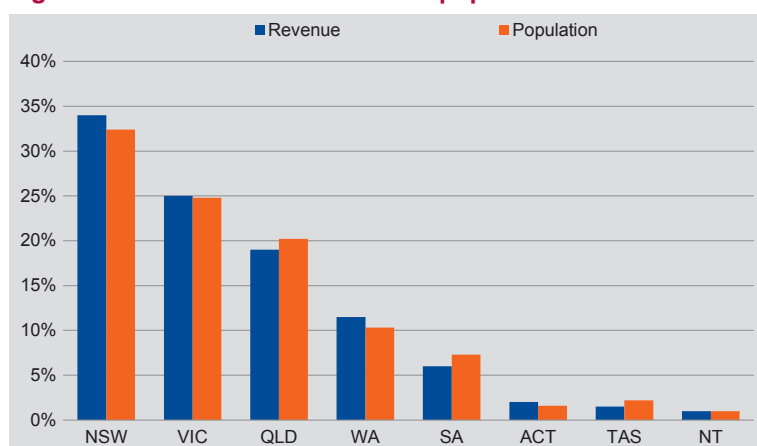
Source: IBISWorld Industry Report, Business Services in Australia, 2011

¹ Note that businesses providing ICT services and financial services, such as accountants and bookkeepers, could also be considered within the Business Services Industry, however these sectors are discussed in separate Escans.

The number of businesses in the industry is hard to quantify. IBISWorld estimates there are approximately 135,863 businesses but this number includes those businesses involved in IT and accounting, which are considered as part of separate Escans.²

It is estimated that 87 percent of Business Services enterprises are small to medium businesses. However, the industry in Australia also includes a few very large multinationals, particularly in the human resource management and management consulting sectors. Businesses are distributed across every state, broadly in line with economic activity. Figure 2 shows that there is a slightly higher concentration of activity in New South Wales, Victoria and the ACT. This is due to Sydney and Melbourne being home to many corporate head offices and government activities being located in Canberra. Western Australia also has a higher concentration of Business Services activity, driven by the mining boom; about 15 percent of engineering consultancy services are located in Western Australia. The data also suggests that states with smaller populations host a higher share of sole traders.

Figure 2: Distribution of revenue vs population



Source: IBISWorld Industry Report, Business Services in Australia, 2011; ABS, Australian Demographic Statistics, December 2010

The performance of the Business Services Industry is closely tied to the performance of the economy as a whole. If businesses have the money to spend on services, the Business Services Industry does well. The economic downturn of 2008-2010, for example, saw businesses looking to cut costs and put off any spending on non essential services, with a resulting negative impact on the Business Services Industry.

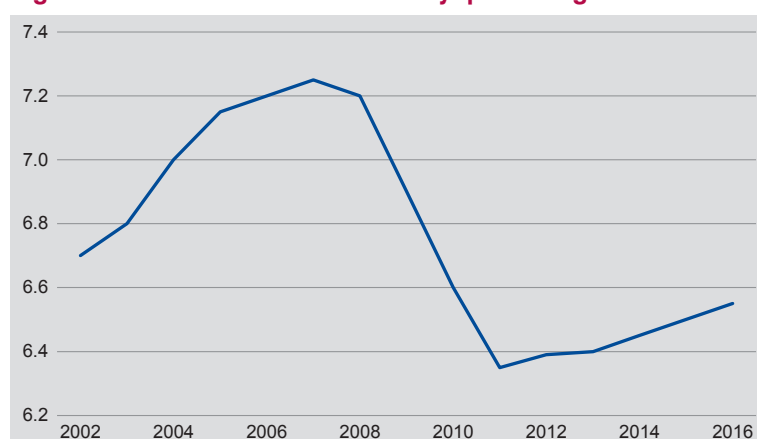
However, over the next five years, as the overall economy recovers, the Business Services Industry is also expected to bounce back. Revenue in 2010-11 in the Business Services Industry was \$138.7 billion. In 2011-12 growth is expected to average 4.3 percent per annum to reach \$170.9 billion in 2015-16.³ Growth is such that the Business Services Industry is now credited with more than twice the share of GDP than that of manufacturing.⁴ Despite a decline in share of GDP between 2009 and 2011, the industry's GDP share is on the rise again. Revenue currently accounts for around 6.4 percent of GDP as the flow on effects of the resources boom boosts several sectors in the industry. While economic troubles in Europe do pose a risk, a positive factor for Business Services is that China remains strong. Much of the professional services sector can expect to benefit from the supply of work that China's growth promises over the coming five years.

² IBISWorld Industry Report, Business Services in Australia, June 2011. According to IBISWorld there are about 49,500 businesses in Australia providing IT consultancy services and nearly 10,000 providing accountancy services.

³ IBISWorld Industry Report, Business Services in Australia, June 2011. Note: these figures are drawn from the IBISWorld definition of business services which also include accounting services and IT services which are also covered in separate Escans

⁴ Glen Stevens, Economic Conditions and Prospects, address to the Economic Society of Australia (Queensland), June 2011

Figure 3: Business Services Industry: percentage share of GDP



Source: IBISWorld Industry Report, Business Services in Australia, June 2011

Due to the diversity within the Business Services Industry, it is difficult to get a feel for the key trends and issues without understanding the business environment of each of the sectors within the industry. A brief summary for each sector is provided below. Data is drawn from IBISWorld industry reports unless otherwise referenced.

Customer contact sector

There are currently a total of 3,650 contact centre establishments in Australia but about 90 percent of these are in house operations. These centres are often variations of customer service and sales departments within a given company.

Sales make up about 25 percent of industry revenue while customer service activities – including customer acquisition, customer care or retention and technical assistance – comprise 56 percent. Customer care generates the most industry revenue. The technical assistance part of the sector has increased over the five years through to 2010-11 due to rapid advances in Information and Communications Technologies, the transition to online banking and installation or upgrading of existing electronic services. Contact centres are used in all industries but particularly in service industries and particularly by businesses with high levels of presale and post sale interaction with customers.

Despite strong underlying corporate demand, profitability in the contact centre sector has suffered due to growing competition from offshore operations in developing regions that benefit from significantly lower labour costs. The years of poorest industry growth over the last decade largely represent the industry's biggest call centre operators moving offshore. Over the next five years the industry in Australia faces relatively low growth as more contact centres are outsourced overseas. Still, the industry is expected to generate over \$50 billion in revenue by 2013-14.

High staff turnover has long been an issue within the call centre industry resulting in high costs in training and staff tenure incentives. One method of increasing staff tenure, outside of pay incentives, has been the development of teleworking. Twenty percent of operators now allow their agents to work from outside the call centre establishment.

As simple contact functions are moved offshore, competition is expected to be largely based on quality. Service quality is increasing in importance for customers. Despite the savings to be made by employing overseas staff, some industries may continue to use Australian based staff to respond to customer preferences to speak to local operators. For example, Australia's largest banks do not use offshore staff as it negatively influences public opinion and affects brand image.

Other key developments in the sector include the coming of the multi channel contact centre, the rise of social media in customer interactions and the importance of workforce optimisation.⁵ Multichannel contact centre software allows interaction with customers using a variety of communication channels, often completing a single transaction across various modes – email, web chat, SMS, fax and phone. Workforce optimisation is about capturing, analysing, and acting on information relating to workforce performance, customer interactions and customer service processes.

Market research sector

The market research sector has a large number of small operators and is highly fragmented. The combined market share of the top four players in the sector is less than 30 percent. Over three quarters of businesses are located in New South Wales and Victoria.

Demand for services is closely linked with:

1. Consumer disposable income – if consumer spending is expected to be weak, the number of new products and services developed will be lower, reducing demand for market research services, and
2. Elections and new government policies – media and political parties seek market research to gauge public response to policies.

Demand for market research is expected to increase over the next twelve months as businesses look to identify the best ways to capitalise on the economic recovery. Over the next five years, industry revenue is projected to rise by 3.2 percent per annum to reach \$1.13 billion in 2015-16.

The emergence and growth of new online media presents an opportunity for market researchers as clients seek information on audience numbers and the effectiveness of their online promotions. The challenge will be in developing effective measurement systems. Top industry players are beginning to use sophisticated systems such as sentiment analysis, neuroscience – monitoring people's brain activity when they choose a product – and other technologies that listen to and analyse social media chatter.

In developing new metrics systems, market researchers are expected to face competition from information technology specialists that will look to use their expertise to develop competing systems. As the industry moves from being mainly product driven to being solutions driven, market research businesses may also face competition from management consultants.

Advertising and public relations sector

The advertising industry is very sensitive to changes in economic activity. This sector is expected to make a modest recovery in the next year due to stronger economic conditions. IBISWorld forecasts that revenue will increase at an average annual rate of 2.8 percent over the five years through to 2015-16, bringing with it stronger employment growth for the sector.

The fragmentation of consumers' media habits is a key challenge for the sector. The effectiveness of traditional media is reducing and the digital space is a major growth area. The move online has emphasised the trend towards integrated marketing campaigns combining: above the line communications, which are broadcast to mass audiences, such as mainstream media advertising; with below the line, niche focussed communications, such as public relations and promotions.

The structure of the sector is changing as a result. Many firms are diversifying into very large and dominant one stop shop marketing communication companies offering both above and below the line services. At the same time, growth is forecast in specialist agencies to service those clients looking for greater creativity and lower cost services.

The public relations area is benefitting from use of social media such as blogs, discussion forums and social networking sites. The development of interactive applications for Facebook and iPhones that

⁵ callcentres.net (2010) *Australian Contact Centre Industry Benchmarking Report 2010*

appeal to users while also promoting a brand is a growing trend and is blurring the professional lines between advertisers, public relations firms and software developers.

Legal services sector

There are 16,398 legal services businesses in Australia, which together generate \$23.1 billion in revenue. The sector is characterised by low industry concentration, with about half of all practices being non employing firms – no firm in this sector in Australia accounts for more than three percent of total revenue. While the industry has performed reasonably well in the past five years and growth is expected to continue at around 3.3 percent per annum for the next five years, many operators say that profit is not as high as previous years due to rising costs, particularly wages.

The legal services sector is labour, knowledge and skills intensive. Labour costs are expected to account for an estimated 31.2 percent of industry revenue. Lawyers require a high number of support staff for research, records management and ad hoc duties including paralegal and legal support service functions. While supply of paralegals is reasonably balanced, frequently by law students or graduates, the legal services support service functions, eg liaison with enforcement agencies, remain in demand. The major companies are investing considerable resources in technology to assist in more efficient provision of legal services, as well as to offer new services, for example email and videoconferencing, in order to differentiate themselves from other firms.

Over the next five years growth areas are expected to include environment and climate change law and energy and resources.

Human resource management sector

The number of businesses dedicated to providing recruitment, job search and human resource (HR) strategy consulting in Australia is small at 760 – however, a further 2,000 businesses offer temporary placements and labour hire. HR functions are also embedded in all other businesses, excepting single operator businesses. The HR sector suffered a brief downturn in 2008-09, but growth is back and revenue is expected to accelerate to an average of between 3.2 to 3.8 percent per year for the next five years. The year 2011-2012 is expected to be particularly strong as employers become more confident to hire and workers become more confident about switching jobs. Competition in the industry is high and profit margins are thin and this trend is increasing.

This sector is sensitive to changes in government employment programs with about 30 percent of its revenue derived from this source. No significant changes to government employment policy which would threaten this large revenue base are envisaged in the near future. Factors driving growth in the industry include the expansion into new services such as employee process outsourcing – administering workers compensation arrangements, superannuation and other compulsory and statutory payments to employees on behalf of clients.

For the temporary staff services segment of this sector the mining industry is expected to be a key driver of growth, as is the continuing trend by business and governments to outsource non core activity such as maintenance work, requiring access to large pools of temporary or contract workers. As business and workforce planning achieved a boost following the global financial downturn some demand has been reported for services that assist businesses in these functions.

Data collection, hosting, processing, management and analysis sector

This sector provides data collection, data entry, data analysis, hosting services and computer time sharing. It was once a major growth industry in Australia but is now growing less strongly due both to greater competition from international companies and falling demand. The industry is rapidly shedding jobs as much of the routine work is now done overseas by cheaper international operations. In the five year period through to June 2011, industry employment will have contracted by 1.2 percent per annum. This trend, known as off sourcing, is set to continue.

There is a notable exception to this decreased growth and this results from movement from information services rather than more simple data processing functions. The cloud computing subsector, comprising online data processing and storage activities, has significant growth potential with the coming of faster internet and new internet based products and services. As a number of key products and services become available in the coming five years, such as several Apple devices, growth is expected to average 4.5 percent per annum to reach \$1.3 billion in 2015-16. A key factor that could limit growth is the issue of security. However, cloud based storage offers information functions well beyond those conceptualised by data processing, with data mining and analysis a high value outcome and service.⁶ Potential cloud computing users need to be reassured that their data cannot be accessed by the outside world and that the cloud operator does not use their information for undesirable purposes.

The finance and insurance industry and government are key clients of this sector due to their high data and transactional requirements. The health and education industries are expected to be sources of strong revenue growth in the next few years, particularly with the rollout of the national broadband network (NBN) and the consequential growth of online health and education services, creating new revenue streams for the industry.

Improved systems and technology have expanded the range of services that data businesses can offer to clients, including many value added services, such as data warehousing, mining and analysis. The future for the industry is expected to be about companies providing tailored services and focussing on higher value, premium services. These developments along with the off sourcing of low skilled services are reshaping the labour mix, creating a stronger need for more highly skilled employees.

Management consulting sector

There are nearly 4,000 management consulting businesses in Australia with many of these being small firms operating in highly specific skill areas or particular regions. The sector has benefited from organisation planning within governments and larger businesses to lower staff and associated overheads and concentrate on their core strengths and functions, leading them to outsource, or buy in, expertise from specialist businesses. As this trend continues sector revenue is expected to grow 4.8 percent per year to \$8.95 billion in 2015-16.

Management consultants are becoming more interested in providing start to finish services. This refocussing has contributed to a long term trend of consolidation in the sector starting with business planning and including management consultants with IT specialities. At the same time, specialist IT consultants are now branching out to offer a full service for clients, putting them in competition with management consultants.

There has also been a shift in the type of work being undertaken by management consultants from a traditional focus on management and strategic consulting towards technical consulting and implementation.

Workforce characteristics and employment trends

Data on the Business Services workforce is not captured in a consistent way across sectors. However, it is understood that the industry is highly reliant on skills and knowledge in all areas of activity.

The Australian and New Zealand Standard Industry Classification (ANZSIC) Professional, Scientific and Technical Services division contains most of the Business Services Industry sectors including legal services, management consulting, advertising services and market research. However, the division also includes other professional services not considered in this Escan such as architecture, accounting and veterinary services. This division has grown by 19 percent in the past five years to now employ 847,500 workers – or seven per cent of the Australian workforce. The division is expected to grow by a further 150,000 workers in the next five years, making it the third biggest growth industry after construction and healthcare.

⁶ Data mining is defined as the process of finding correlations or patterns among dozens of fields in large relational databases.

The majority of new jobs are expected to be in the architectural, engineering and technical services and legal and accounting services areas, suggesting likely growth in the management consulting and legal services sectors. Most activities in this industry require a high level of expertise and formal training. In these sectors just 22 percent of workers do not have post school qualifications compared with an average of 39 percent for all Australian industries.

Most of the other Business Services sectors – employment placement, recruitment and labour supply services, call centres and other administrative services fall within the ANZSIC Administrative and Support Services division. This division has 412,000 workers and comprises four percent of the workforce. This workforce has a relatively low skill profile with almost half its workers not having post school qualifications. This part of the industry offers important entry level labour market opportunities. The division is expected to grow by 48,400 workers, nearly twelve percent, in the next five years.⁷

Figure 4 shows the occupations in the Business Services Industry that are listed in the Department of Education, Employment and Workplace Relations (DEEWR) top 20 occupational clusters for projected employment growth to 2015-2016.

Figure 4: Business Services occupations in the DEEWR top 20 occupations for employment growth to 2015-2016 (000's)



Source: DEEWR, Australian Jobs, 2011

More than half the projected growth in jobs over the next five years is expected to be in the highly skilled occupations requiring a Bachelor Degree or higher qualification or an Associate Degree, Advanced Diploma or Diploma. This aligns with IBSA's industry association survey which also indicated high forecast demand for professional and technical skills.

Some other key employment trends for the industry are highlighted in the 2011 Robert Walters salary survey⁸ which analyses demand in several Business Services occupations. These trends include:

- Hiring levels for secretarial and business support was strong at the end of 2010 and market confidence improving. Companies will need to focus on retaining quality back office support staff, taking into account that employees may be seeking salary increases and better work life balance.
- Organisations are increasingly recognising the ability of HR to increase efficiency, productivity and profitability of business. Tertiary qualified specialist and generalist human resource management professionals are expected to continue to be in strong demand, particularly professionals with experience applying new technology to good HR practice and more companies are expected to seek to trial these platforms.

⁷ Department of Education, Employment and Workplace Relations, Australian Jobs, 2011

⁸ Robert Walters, Robert Walters Global Salary Survey, 2011

- More organisations are expected to source off shore talent and candidate shortages are expected to grow – requiring a greater emphasis on developing competitive packages, attracting the best talent and retaining and motivating existing staff.
- There is expected to be a high demand for change management specialists to support staff through process, technology and organisation changes.
- Salaries are expected to increase for highly qualified marketing and communication professionals as companies increasingly recognise the importance of this function.

Industry and workforce outlook

Industry outlook

Considering each of the sectors in the industry, a number of trends are apparent that are expected to have a significant impact on business success and related workforce and skilling adjustments in the medium term:

- Outsourcing is set to increase as the economy picks up again, signalling a continued robust growth in all Business Service sectors although this is not expected to be as strong as pre global financial downturn levels
- A mixing and blurring of industry sectors is occurring, as clients outsource total solutions. For example, there are now significant overlaps between market research, advertising, public relations and customer contact services; along with human resource management, training, management consulting and IT consulting. This creates competition between sectors as well as some consolidation within the industry
- Competition from off shore operations, particularly for routine and low level activities, and thin profit margins in some industries are expected to require a greater focus on offering high quality and premium services
- The advance of the NBN is expected to open up new revenue streams for businesses and more efficient ways of operating and delivering services
- The continuing presence of social media is providing new ways to engage with customers but also involves challenges in how to understand and measure customer satisfaction
- Risk management and corporate governance have become key issues for businesses in the wake of the global downturn and other unforeseen events such as natural disasters and the emergence of new risks related to security in the online environment, and
- Increasing recognition of sustainability practices is influencing the way businesses operate, with a greater need to incorporate triple bottom line thinking in all aspects of workforce skilling to facilitate supply chain management and promote sustainable practices.

Workforce and employment outlook

The evidence suggests that high level skills will increasingly be in demand. Higher skills and education levels, both for managers and their workforces, are positively and significantly associated with the ability to develop and deploy superior management practices, which in turn contribute to innovation and productivity.⁹

Overlaps amongst sectors within the industry mean that employers are likely to demand a mix of skills from different disciplines. This skills convergence may bring more flexibility to the workforce.

Businesses are demanding a stronger focus on generic skills. A recent survey of employers of business graduates found Australian employers considered the skills of problem solving and information

⁹ Agarwal and Green, The role of education and skills in Australian management practice and productivity, 2011

management to be the most important in graduates.¹⁰ Skills in communication and relationship management are expected to also grow in importance as routine tasks move off shore and businesses seek to increase their client base by providing premium, customised services.

Business Services skills are required by all industries and a lack of these skills contribute to the nation's skills shortages. The latest DEEWR Skills Shortages report, December 2010, found that in some places applicants for childcare manager positions had the required qualifications and child care experience but lacked the required management and administrative skills, thus creating a skills shortage.¹¹ The training industry has a similar issue with capability gaps in management and leadership skills.¹²

The need to improve leadership skills in businesses was identified by the Boston Consulting Group as one of the top priorities for Australian and international businesses in 2011.¹³ Many organisations are now realising that leadership skills are not just required by senior staff but by staff at all levels.¹⁴ A third of respondents to IBSA's industry associations survey indicated a shortage of leadership, coaching and mentoring skills.

Appendix B includes a full list of occupations in demand that has been collated from industry intelligence on industry and workforce trends, including the latest DEEWR job outlook data and priority occupations list. The occupations in demand list contributes to workforce development and planning strategies highlighted in Chapter 3 and also presents a clear relationship to training packages.

The following occupations and job roles have been reported by IBSA stakeholders as being particularly in demand in the Business Services Industry:

- HR managers and specialists
- General clerks
- Public relations professionals
- Management and organisation analysts, including change managers
- Sales, marketing and business development managers
- Social media analysts and strategists
- Business coaches and advisors
- Office and practice managers
- Contract and project managers, and
- CSR and sustainability managers, including OHS officers.

¹⁰ Jackson and Chapman, Business graduate skill sets – summary report, 2010

¹¹ Department of Education, Employment and Workplace Relations, Skill Shortages Australia, June 2010

¹² Productivity Commission, The vocational education and training workforce, April 2011

¹³ Boston Consulting Group, Creating People Advantage, 2010

¹⁴ Innovation and Business Skills Australia, The Karpin Report Revisited, 2011

Chapter 3 – Identified workforce development needs

Productivity and innovation

Productivity growth, underpinned by improving the skills base of the workforce, is a priority for the Australian Government. Productivity is central to growing the economy and reducing the economic and fiscal pressures of an ageing population.¹⁵ Australia's productivity has been in decline in the last decade and some say that this is addressed the nation is facing the end of a period of comparatively easy prosperity.¹⁶ A recent National Australia Bank analysis supports this assessment of a productivity slowdown and shows below average productivity and below average productivity growth in all Business Services sectors.¹⁷

Skills Australia proposes a deeper focus on workforce development and skills use to enable productivity in businesses. Research indicates that areas that require attention by business include:

- Learning fundamental knowledge which increases the capacity of individuals to solve problems and adapt to new situations and technologies¹⁸
- Developing management and leadership skills at every level of the workplace, with an emphasis on building structured, team based innovation capability across firms and organisations¹⁹ and
- Ensuring the flexibility to upgrade skills and adapt to market conditions through ongoing workplace training.²⁰

The Business Services Training Package is the most important product the vocational education and training (VET) sector has to support productivity growth across the economy. A study of innovation in Australian firms found that in the industries studied – retail, wholesale and financial services sectors – the skills that are most important for innovation, at the present time and in the future, are marketing, business management, finance and project management skills; all the preserve of the Business Services Training Package.²¹

The sharp increase in enrolments for the Diploma in Business Management in the last year indicates that industry is beginning to value these skills more and recognise that employees need a reasonably high level of skill in these areas. But broadly based skills may not be enough. IBSA Escan industry consultations indicated that businesses want to employ people from their own industries but they need to have blended skill sets – industry specific knowledge as well as broadly based business skills.

In 2011, DEEWR initiated the development of an Employability Skills Framework that is expected to be finalised in mid 2012. To foster productivity and innovation, the Business Services qualifications will be explicitly addressing new employability skills.

Responsive VET system

In a survey of Australian employers of business graduates, the need to give higher education graduates more access to real work examples and practical work experience in higher education was perceived as the most important role of the modern business school.²²

While Business Services is the most popular, and growing, area of VET study, accounting for 13.9 percent of students in 2010, it appears that firms are not turning to VET graduates when they look

15 Australian Government, Australia to 2050: future challenges, the 2010 intergenerational report, January 2010

16 Saul Eastlake, Productivity, paper presented to the annual policy conference of the Reserve Bank of Australia, 2011

17 National Australia Bank, The Productivity Puzzle, National Australia Bank Research, 27 September 2011

18 Dalitz cited in Misko and Nechvoglod, Why firms innovate and what it means for VET, 2011

19 Agarwal and Green, The role of education and skills in Australian management practice and productivity, 2011

20 Organisation for Economic Cooperation and Development, Innovation to strengthen growth and address global and societal challenges, 2010

21 Misko and Nechvoglod, Why firms innovate and what it means for VET, 2011

22 Jackson and Chapman, Business graduates skill sets – summary report, 2010

for individuals with the skills and knowledge required for promoting products and services; analysing and managing business operations, processes and projects; building statistical models to predict growth and risk; and developing IT systems and databases.²³

Industry consultations indicated that there is a desperate need for graduate level qualifications in the Business Services Training Package. University graduates want vocational style qualifications to apply their learning, but they do not want to do these at a lower AQF level. Forty percent of participants enrolled in Business Services qualifications in 2010 already had a Diploma, Advanced Diploma, Bachelor Degree or higher level qualification.²⁴

The current lack of popularity of the Advanced Diploma in Business may well be symptomatic of the fact that university graduates, once in the workforce, want to progress to graduate qualifications; and graduates of the Diploma in Business prefer to articulate to a higher education pathway rather than moving to an Advanced Diploma. Industry advice also indicates that students are choosing the VET Diploma in Business as an alternative and less expensive pathway to higher education. In light of this, the mix of skilling products on offer may need rethinking. More research on the demand for VET business qualifications in relation to the demand for higher education business qualifications would assist this process.

There may also be opportunities for training providers to partner with firms to provide the specific skills they need to develop their workforce or to partner with universities to provide the combination of high level yet practical skills employers and graduates are looking for. Skills Australia's proposal to make Australian Government funded places for degrees in specialist vocational areas available to non university providers would assist with filling this identified need in the Business Services Industry.²⁵

Better promotion of the flexibility and quality of VET Business Services products and outcomes may also help employers use and value the products as offering the practical skills that they believe their staff need.

Workforce participation

Productivity growth also depends on having an adequate level of workforce participation. Skills Australia and the Australian Government have pointed out that unless all Australians have the capability and opportunities to participate in work, the economy will suffer. Skills Australia calls this issue 'the challenge of the decade'. At a time when workforce participation is expected to fall due to the ageing population, participation needs to increase by four percent, to 69 percent, by 2025. This includes an additional 2.4 million people in the workforce with qualifications at Certificate III level and higher within the next four years.²⁶

The Business Services Industry and VET providers need to consider new ways of:

1. Encouraging people who may not have considered a VET pathway in the past into VET courses and supporting them to complete and move into employment. People who have low participation and achievement rates in VET include people with a disability, Indigenous people and older people. This may require providing new programs, support services or more inclusive learning environments.
2. Encouraging people who begin Certificate II qualifications to complete and move into higher level courses. While more Business Services students undertake higher level qualifications than VET students generally – 23 percent of Business Services students undertake a Diploma or higher versus 14 percent of the general VET population – opportunities for progression are critical for skills deepening. This may require tapping into existing workers and appealing to the large numbers of students, particularly VET in Schools students who undertake Certificate II in Business. Certificate II in Business is the most popular qualification in the Training Package attracting more than 32,000 enrolments in 2010.²⁷

²³ Misko and Nechvoglod, Why firms innovate and what it means for VET, 2011

²⁴ National Centre for Vocational Education Research, VET provider collection, 2011

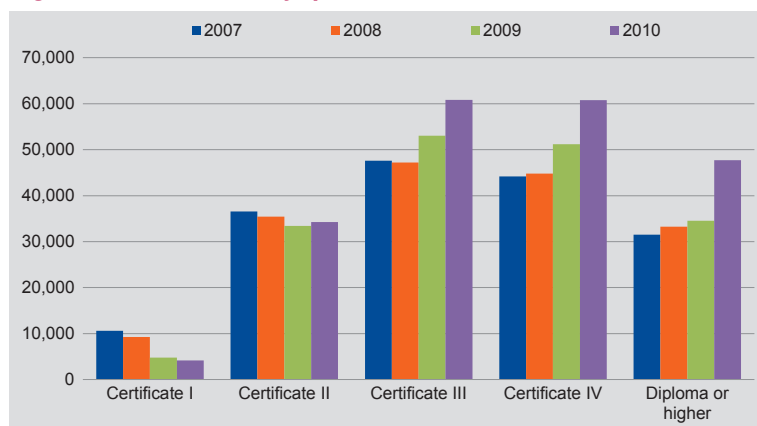
²⁵ Skills Australia, Skills for prosperity: a roadmap for education and training, May 2011

²⁶ *Ibid.*

²⁷ National Centre for Vocational Education Research, VET provider collection, 2011

Figure 5 shows that in the last three years there has already been an increase in the proportion of the overall training effort directed at Certificate III and above, although there has only been a small impact on completions to date.

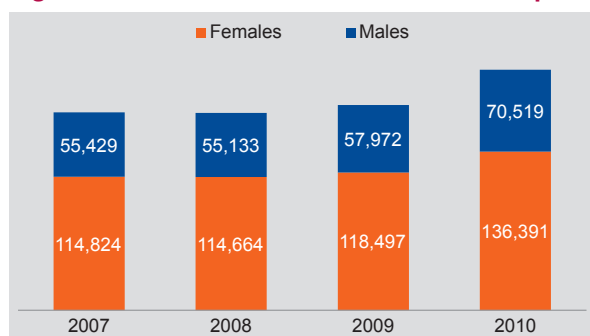
Figure 5: Enrolments by qualification level in Business Services 2007–2010



Source: NCVER, VET Provider Collection, 2011

The Business Services student cohort is both older and more feminised than other VET industry areas. Students aged 24 years and under represent 43.4 percent of all VET students, whereas only 39 percent of enrolments in Business Services qualifications are by students 24 years and under. Nevertheless, there are still large numbers of young people enrolling in Business Services qualifications. Business Services is also the second most popular training package for all VET in Schools students, accounting for 13.7 percent of enrolments.²⁸ Men make up more than half of the total VET student population, 52.4 percent, but comprise only 34 percent of the Business Services enrolments. Figure 6 shows that these proportions have remained fairly stable over time.

Figure 6: Enrolments in Business Services qualifications by gender



Source NCVER, VET Provider Collection, 2011

Engaging small business

The Business Services Industry is largely made up of small businesses. The critical importance for all businesses in being able to work in the digital age is well known. This is a particular challenge for small businesses that do not generally have specialist IT staff. One recent report by Deloitte found that the boost to productivity for business and government provided by the internet amounts to an increase in GDP of around \$27 billion. In addition, for small and medium businesses looking to become

²⁸ National Centre for Vocational Education Research, VET in Schools, 2009

established, or to grow significantly, the potential value of the internet is higher. Despite this, a survey of 150 Australian SMEs indicated that:

- less than half had a website, and
- only around 30 percent of businesses were using the internet for marketing, sales and procurement.²⁹

IBSA Escan industry consultations also confirmed that, on the whole, small businesses do not currently have the digital literacy to take advantage of the NBN.

With the Vocational Education Broadband Network also on the horizon, the internet is set to become a critical tool in providing access to learning for small business.³⁰ Small business traditionally finds it hard to release workers to attend face to face training but the benefits of these new developments may only be realised if small businesses have the digital skills to capitalise on them.

The Escan industry consultations also revealed that while small businesses increasingly recognise the importance of workforce development and the need to invest in skills, they do not always have the capacity to know where and how to invest. In a survey of IBSA industry associations, 45 percent of respondents said support from external organisations such as a training organisation or industry skills council is needed for organisations to formulate a workforce development plan. VET providers can play a much bigger role in supporting small businesses with workforce development and Skills Australia considers that enterprise consultancy services should become a core and expected function of the VET provider's role.³¹

Submissions to Skills Australia's 2011 *Skills for Prosperity* report suggested that government cofunding is necessary to support small businesses to undertake skilling activities. The National Workforce Development Fund – with funding of \$558 million over four years for 130,000 training places³² – is expected to provide explicit opportunities for small business to take up workforce development planning and investment opportunities.

Traineeships

Figure 7 shows that traineeship commencements in Business Services qualifications have increased markedly over the last two years; with completions maintaining a similar trend. Completion rates for contracts of training are used as a significant performance indicator for the national VET system and are considered a concern across all industries. An Expert Panel on Apprenticeships for the 21st Century has provided recommendations to address the unacceptably low completion rates of this skilling pathway, which hovers around 48 percent. Better support for employers and apprentices and trainees, including mentoring and pastoral care, are proposed to improve completions.³³ The Australian Government has allocated \$101 million in its latest budget for an *Australian Apprenticeship Mentoring Package* designed to improve apprentice and trainee retention and completions.³⁴

Mentoring strategies for Business Services trainees should take account of the particular characteristics of the student cohort, including the large numbers of female students. Strategies should also be designed to support pathways for those groups of students that are underrepresented in VET. This would create a broader recruitment base for businesses in the industry.

29 Deloitte, *The connected continent: how the internet is transforming the Australian economy*, 2011

30 Skills Australia, *Skills for prosperity: a roadmap for education and training*, May 2011

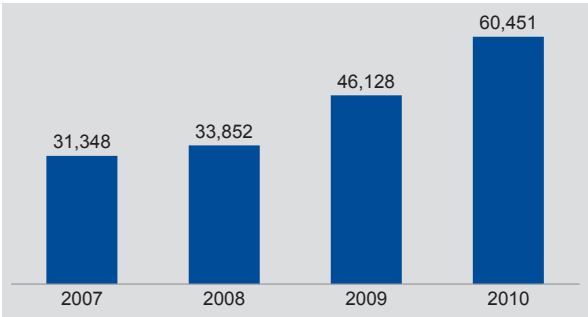
31 *Ibid.*

32 Australian Government, Budget 2011-12 www.budget.gov.au, May 2011

33 Expert Panel on Apprenticeships for the 21st Century, *A shared responsibility*, January 2011

34 Australian Government, Budget 2011-12 www.budget.gov.au, May 2011

Figure 7: Business Services qualifications apprenticeships and traineeships commencements 2007–2010



Source: NCVER, Apprentices and Trainees Collection, June 2011.

Chapter 4 – Current impact of training packages

Update on training packages

BSB07 Business Services Training Package

The Business Services Training Package details qualifications and competency standards that are recognised nationally by industry and training regulators. There are 58 qualifications in version 5.0 of this Training Package, ranging from a Certificate I in Business to Advanced Diplomas in a range of specialisations, including:

- Administration
- Advertising
- Compliance
- Customer contact
- Educational support services
- Franchising
- Frontline management
- Governance (Indigenous organisations)
- Human resources
- International trade/business
- Legal services
- Management
- Marketing
- Medical administration
- Micro business operations
- Occupational health and safety
- Organisational learning and capability development
- Project management
- Purchasing
- Quality audit
- Recordkeeping
- Sales
- Small business management
- Strategic management

As part of its continuous improvement process IBSA will review the customer contact, occupational health and safety, human resources and project management streams in 2011-2012.

Customer contact (Version 6)

The following customer contact units of competency and qualifications have been reviewed to better address changes within the industry, including multi channel communication, data interrogation, compliance requirements, achieving key performance indicators, scheduling requirements and inbound and outbound customer contact.

- BSB20207 Certificate II in Customer Contact
- BSB30207 Certificate III in Customer Contact
- BSB40307 Certificate IV in Customer Contact, and
- BSB50307 Diploma of Customer Contact.

Greater flexibility has been provided in the qualifications by reducing the number of core units and providing a larger choice of elective units. The Advanced Diploma has been removed from the Training Package due to the lack of industry demand and uptake. Version 6 of the BSB07 Business Services Training Package, including the revisions to the customer contact units and qualifications, was endorsed by the National Skills Standards Council (NSSC) in October 2011.

Occupational health and safety

The suite of occupational health and safety qualifications and units of competency are being reviewed to address current and emerging industry skilling requirements as identified in the *Scoping Review of BSB07 Occupational health and safety qualifications and units of competency*. The project will also address the requirements of the new national model Work Health and Safety (WHS) Regulations.

The qualifications include:

- BSB30707 Certificate III in Occupational Health and Safety
- BSB41407 Certificate IV in Occupational Health and Safety
- BSB51307 Diploma of Occupational Health and Safety, and
- BSB60607 Advanced Diploma of Occupational Health and Safety.

The scheduled date for completion of this review is mid 2012.

Project management

Project management qualifications will be reviewed as part of the IBSA 2011-2012 Training Package Continuous Improvement Plan and will involve scoping, review and revision of:

- BSB41507 Certificate IV in Project Management
- BSB51407 Diploma of Project Management, and
- BSB60707 Advanced Diploma of Project Management.

This review will involve the facilitation of discussions with industry and interested ISCs to establish a framework for future project management qualifications and will investigate creating stronger links with project management groups outside VET, such as the Australian Institute of Project Managers.

Work on the review has commenced and the scheduled completion date is 30 June 2012.

Human resources

Adjustment to the human resources qualifications will be considered, including the scoping, review and revision of:

- BSB41007 Certificate IV in Human Resources
- BSB50607 Diploma of Human Resources Management, and
- BSB60907 Advanced Diploma of Management (Human Resources).

It is intended that the review will lead to the endorsement of revised units of competency and qualifications for inclusion in the Business Services Training Package. The work may also entail the development of new units of competency within these qualifications and/or the development of appropriate Skill Sets and/or new qualifications.

Work on the review has commenced and the scheduled completion date is 30 September 2012.

Uptake of training packages³⁵

As explained in previous Escans, while data on publicly funded VET activity, and qualifications issued – commencements and completions – are of interest, the results in any one year are not able to be compared.

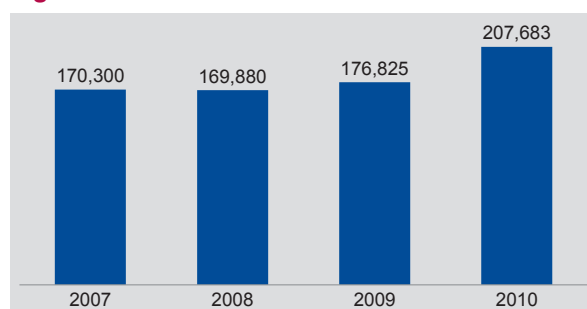
Comparisons, within one year are problematic because:

- Any VET learner undertaking skilling in more than one calendar year for the same qualification may have multiple enrolments.
- Where multiple year learning takes place the completions are recorded in different years from the commencements/s.
- State and territory completion processes vary significantly and have limited comparability.

Generally, this results in an over representation of commencements and an under representation of completions. This over representation of commencements does not apply to traineeships and apprenticeships, but the underrepresentation does apply to completions. For further information on enrolments and qualifications issued in Business Services qualifications please see Appendix C.

Figure 8 shows that the number of enrolments in the Business Services Training Package took an upward swing in 2010 from a relatively stable base in the three years previous; there was a 17 percent increase in enrolments between 2009 and 2010.

Figure 8: Enrolment numbers in Business Services Training Package 2007-2010



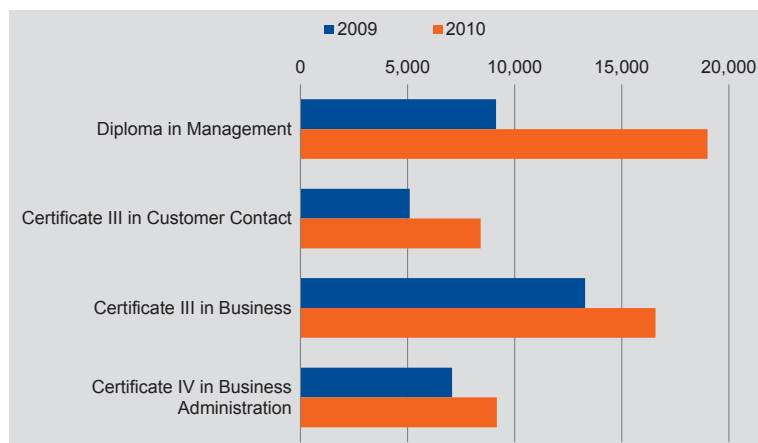
Source: NCVER, VET Provider Collection, 2011

For 2010 the five Business Services qualifications with the highest enrolments represented 51 percent of total enrolments in that Package. These qualifications and the total number of enrolments are listed below.

1. BSB20107 Certificate II in Business – 32,138 enrolments
2. BSB30407 Certificate III in Business Administration – 26,648 enrolments
3. BSB51107 Diploma of Management – 19,013 enrolments
4. BSB30107 Certificate III in Business – 16,329 enrolments
5. BSB40807 Certificate IV in Frontline Management – 12,254 enrolments

Increased enrolments in the Diploma of Management were responsible for much of the growth. Enrolments more than doubled in 2010 from 9,127 to 19,013. Figure 9 shows that the Certificate III in Business, the Certificate III in Customer Contact and the Certificate IV in Business Administration also picked up significant numbers of enrolments. The Certificate IV in Customer Contact experienced the biggest percentage change in enrolments, more than tripling its numbers from 440 enrolments in 2009 to 1,498 in 2010.

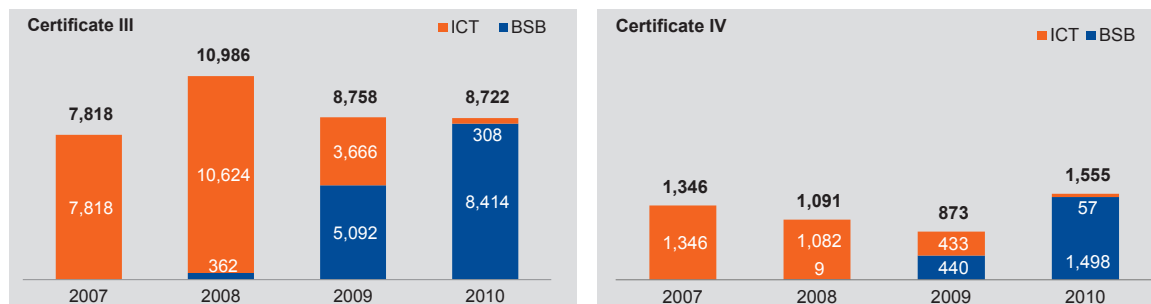
³⁵ Note that the data presented here is from the annual NCVER VET Provider Collection which reports publicly funded training and VET fee for service activity provided by public institutions. The tables and figures should be read understanding that significant amounts of training also occur outside the publicly funded VET system, including fee for service training in national qualifications provided by private training providers; in house training delivered by enterprise RTOs and non accredited training conducted in house or by external providers.

Figure 9: Business Services qualifications with highest growth in enrolments 2009-2010

Source: NCVET, VET Provider Collection, 2011

Industry commentary suggests that growth in commencements of the qualifications listed in Figure 9 could in part be attributed to the Productivity Places Program (PPP). Data on PPP enrolments suggests that the program contributed, on average, to a third of the growth in these qualifications. Recent new Australian Government co-funding arrangements, in programs such as the Enterprise Based Productivity Places Program (EBPPP) and the National Workforce Development Fund (NWDF) that require enterprises to provide evidence of workforce planning along with co-funding, may address reported concerns that some Business Services qualifications are being used to deliver generic, low quality programs. However, this concern is not generally reflected in the data with approximately 66 percent of the growth in commencements in these qualifications not originating in PPP.

The apparent increase in enrolments in customer contact qualifications within Business Services can be attributed to the relocation of these qualifications from the Telecommunications Training Package in late 2007 and the 12 month transition period. Figure 10 shows an overall decrease in enrolments in Customer Contact Certificate III and an overall increase in enrolment in Certificate IV qualifications for the same period.

Figure 10: Enrolments in customer contact qualifications 2007–2010

Source: NCVET, VET Provider Collection, 2011

Outlook for training

The key trends in education and training activity are a noticeable increase in enrolments in Certificate III, IV and Diploma level qualifications; and particularly strong growth in 2010 in the Diploma of Management and in qualifications for the customer contact industry.

Given the workforce development priorities of the industry, IBSA and training providers will need to give attention to the following education issues to respond to industry demand:

- The feasibility of developing graduate vocational qualifications in business and management to cater for the large cohort of students who already have Diploma or Degree level qualifications; and to pick up on the strong demand by industry for higher level skills, particularly in business management, analysis and marketing and sales
- Flexibility in the structure of qualifications to cater for skills convergence between sectors within and outside the industry, particularly in terms of integrating ICT skills and social media skills into a range of business qualifications, and
- Ensuring employability skills, corporate social responsibility (CSR) and leadership skills, are integrated into, and effectively delivered and assessed in, business qualifications at all levels and that the transferability of these skills is highlighted in teaching.

Chapter 5 – Future directions

As the Industry Skills Council with responsibility for the Business Services Industry, IBSA has a key role to play in ensuring appropriate qualifications and skill sets are available for the Business Services Industry and its workforce.

Following the desktop research and industry consultations undertaken for the development of Escan 2012 Table 1 below highlights the workforce development challenges in this industry. Priorities for the Business Services Training Package and for enhanced responsiveness of the national VET system follow.

Table 1: Summary: Business Services workforce development challenges

Workforce development challenge:	Impact on:	Critical future skills:
Developing management and leadership skills at all levels	All businesses	<ul style="list-style-type: none"> Leadership and management
Demand for graduate level vocational skills	All businesses	<ul style="list-style-type: none"> Graduate level vocational skills
Blurring of industry and occupational boundaries	All businesses	<ul style="list-style-type: none"> Generic skills – learning to learn, skills transfer
Digital literacy, including social media skills	All businesses, particularly small business	<ul style="list-style-type: none"> IT Marketing Social media
Working with facilitators to understand workforce planning needs	Small business	<ul style="list-style-type: none"> Workforce planning and development
Access to suitable applicants	RTOs Businesses Existing workers VET in Schools students	<ul style="list-style-type: none"> Mentoring and coaching Flexible recruitment Inclusive learning

Priorities for the Business Services Training Package

Findings from Escan 2012 indicate that priorities for the Business Services Training Package, in working with industry stakeholders, are:

- Promoting the flexibility and quality of Business Services Training Package qualifications to employers, and
- Investigating options to cater for the demand for higher level skills, particularly in business management, analysis and marketing and sales, from an increasing cohort of graduate learners with Diploma or Degree level qualifications.

Supporting a responsive national VET system

To assist in enhancing the responsiveness of the national VET system, support the Business Services workforce and to maximise industry skills outcomes, Escan 2012 findings suggest that stakeholders consider:

- Funding programs to support small businesses to undertake workforce planning and develop digital literacy skills
- Funding for mentors and coaches support to increase apprenticeship and traineeship completions particularly women and older trainees
- Investigating recruitment and career development strategies that identify broader target groups to build a pool of talent to meet future workforce needs

- Supporting students from disadvantaged backgrounds to complete business qualifications through applying inclusive teaching and learning strategies
- Promoting higher level business qualifications to VET in Schools business graduates and partnerships to achieve industry supported institution and workplace based learning arrangements
- Business partnerships to support holistic workforce development solutions to meet enterprise needs and goals
- Ensuring employability skills and leadership skills, are effectively delivered and assessed in business qualifications at all levels, and that the transferability of these skills is highlighted in their teaching
- Building delivery methods that use new technologies and high speed broadband capacity to better meet the needs of business in both metropolitan and regional areas, and
- Partnerships that support enterprise workforce development and business planning.

Appendix A – Methodology, acknowledgements and bibliography

Methodology and stakeholder input

Statistical information for this report was gathered through a desktop research process from a range of sources as indicated in the bibliography.

Further input into this Escan was gathered from industry stakeholders via a series of consultation forums held in 2011. Forums were held in Adelaide, Brisbane, Darwin, Melbourne, Perth and Sydney. A webinar gathered views from regional stakeholders and from jurisdictions not represented in the forums.

Survey tools were used at each of the forums to gather information from participants, including advice on occupations in demand.

This Escan was validated by IBSA's Sector Advisory Committee and State and Territory Advisory Network representatives in November 2011.

The following organisations have made valuable contributions to this Escan report:

ABC Content Services	Australian Government Information Management Office (AGIMO)
Academies Australasia	Australian Human Resources Institute (AHRI)
ACE North Coast Inc.	Australian Industry Group (AiGroup)
Achieving Your Career Potential	Australian Industry Training Providers Pty Ltd
ACS Foundation	Australian Information Industry Association (AIIA)
ACT Department of Education and Training	Australian Institute of Credit Management (AICM)
Adelaide College of the Arts/TAFE SA	Australian Institute of Management (AIM)
Advanced Careers College	Australian Institute of Management (AIM) NSW & ACT
AIC National	Australian Institute of Management (AIM) SA
AiGroup Training Services	Australian Institute of Management (AIM) WA
Always-B-Certified Pty Ltd	Australian Libraries and Information Association (ALIA)
AMA Training Services	Australian Manufacturers Worker's Union (AMWU)
Andrea Thompson Consulting	Print
ANZ Bank	Australian Marketing Institute
APM College of Business and Communication	Australian Medical Association (AMA)
AQUEST	Australian Professional Skills Institute
Arts, Communications, Finance Industries and Property Services (ACFIPS)	Australian Red Cross
Ashley Institute of Training	Australian Securities and Investments Commission (ASIC)
Asia Pacific Training Institute	Australian Services Union (ASU)
Association of Superannuation Funds of Australia Ltd (ASFA)	Australian Society of Archivists (ASA)
Ausdance Victoria Inc	Bendigo TAFE
Australian and New Zealand Institute of Insurance and Finance (ANZIIF)	Berkeley College
Australian Chamber of Commerce and Industry (ACCI)	Box Hill Institute
Australian Computer Society (ACS)	BRACE Education Training and Employment
Australian Council for Educational Research	Bremer TAFE
Australian Council for Private Education and Training (ACPET)	Brisbane North Institute of TAFE
Australian Entertainment Industry Association (AEIA)	Business Foundations Inc
Australian Financial Markets Association (AFMA)	Business Planning Pty Ltd
	Business SA

Business Services Industry Skills Board SA Inc	Excellence in Education and Training
Business Skills Victoria	Family Business Australia
Cabinet Makers Association	Finance Sector Union
Centacare Employment & Training	Finance, Property and Business Skills WA
Challenger Institute of Technology	Financial Planning Association of Australia (FPAA)
Chamber of Commerce and Industry Queensland	Financial, Administrative & Professional Services Training Council Incorporated
Chamber of Commerce NT	Finsia
Charles Darwin University	Foxtel
CHARTTES Training Advisory Council	Fuji Xerox
Cisco	Future Now
Communications and Information Technology Training Ltd (CITT)	FutureStaff Pty Ltd
Communications, Electrical, Plumbing Union (CEPU)	Game Developers' Association of Australia (GDAA)
Community Arts Network SA	Gem & Jewellery Institute of Australasia Limited
Community Services, Health and Education Training Council	Global Markets Investment & Financial Services Association (IFSA)
CompTIA	Gold Coast Institute of TAFE
CQ University Library	GOTAFE
Craft Australia	Grace Training
CREATE Secretariat	Great Southern Institute of Technology
Creative Industries Skills Council (CISC)	Heidelberg Print
Crossbow Consultancy	Heritage Building Society
Cultural Immersions	Higher Purpose Training
CY O'Connor Institute	Housing Industry Association (HIA)
Datacom	Hudson Global Resources (Aust) Pty Ltd
Department of Business & Employment NT	Human Resources & Organisation Development
Department of Education & Communities NSW	Hunter Institute of Technology
Department of Education & Training NT	IIT Training
Department of Education and Training QLD	Inforg Information Solutions
Department of Employment, Economic Development and Innovation QLD	Institute of Public Accountants (IPA)
Department of Further Education, Employment, Science and Technology (DFEEST)	Insurance Australia Group Limited (IAG)
Department of Innovation, Industry, Science and Research	Lane Print Group
Department of Training & Workforce Development WA	Learning Advisory Services Australia (LASA) Pty Ltd
DGIT Consultants Pty Ltd	Lennox Institute
Directions WA	Linda Simon, VET Consultant
Durie Consulting	Local Government Association of Queensland
Dymond Institute of Business	Macquarie Business Training Centre
Electrical and Communications Association	Maddisson Training Group
Electrotechnology and Water Skills Board	Major Industries Training Advisory Council (MITAC)
EPIC Industry Training Board	Martin College
ET Australia	MDS Partners
ETAS (WA) Pty Ltd	Media Entertainment and Arts Alliances (MEAA)
	MG My Gateway
	Midel Education Pty Ltd
	Milcom

Money101	Software, Data#3 Business Systems Pty Ltd
Motor Traders' Association of NSW	St George Bank
MP Personnel and Training	STA Qld
MRAEL Group	Staging Connections
Musicians' Union of Australia (MUA)	Sterling Business College
MyFENG	Strathfield College
National Association for the Visual Arts (NAVA)	Study Group Australia
National Banking Industry Association (NBIA)	Suncorp Metway Ltd
National Institute of Accountants (NIA)	Sunshine Coast TAFE
National Insurance Brokers Association of Australia (NIBA)	Sutherland College of TAFE, Sydney Institute
Nationwide Training	Swinburne University of Technology
NBN Co Ltd	Sydney Community College Representing Adult and Community Education
Northern Territory Library	Sydney Film School
Odyssey House Victoria	TAFE Development Centre (TDC)
Olpac Pty Ltd	TAFE Directors Australia
Open Channel	TAFE NSW
Print NZ	TAFE SA
Printing Industries Association of Australia (PIAA)	The Gordon TAFE
Prografica Printing	The Pivot Institute
QANTAS Airways Limited	Therese Hickey
Radio Adelaide	TITAB Australia
RedOxygen	Traditional Credit Union (TCU)
Regional Group Training	Tropical North Queensland Institute of TAFE
SAI Global	Try Youth & Community Services
Salmat Limited	University of Adelaide
Scripture Union Training Institute	UQ College
Self-Managed Superannuation Funds Association (SPAA)	VET Development Centre QLD
Service Industries Training Advisory Council (SITAC)	Victoria University
Service Skills SA	Victorian Curriculum & Assessment Authority (VCAA)
Skilled Group	Victorian Employers' Chamber of Commerce and Industry (VECCI)
Skills Tasmania	WA Academy of Performing Arts
SkillsHub	WEA Illawarra
Society of Motion Picture and Television Engineers (SMPTE)	WestCoast Institute of Training
	Women in Film and Television (WIFT)

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Appendix B – Business Services occupations in demand

IBSA reports critical occupations in demand to Government and industry stakeholders.

This alphabetical list reflects demand in the Business Services Industry for occupations and job roles reported at IBSA's Escan industry consultations and validations conducted in 2011. Underpinning industry intelligence and research were also incorporated into this list.

Qualifications that correspond to the occupations in demand are also provided. The **bold** occupations and job roles represent newly reported occupations in demand.

A full list of IBSA's occupations in demand is available in the Principal Escan 2012 and on the IBSA website: <http://www.ibsa.org.au/news-and-projects/environment-scan.aspx>

Table 2: Business Services occupations in demand

ANZSCO	Occupation/Job Role	Training Package	Qualification/Skill Set
Business Services			
131112	Advertising, Public Relations and Business Development and Sales Managers	BSB40107 BSB40610 BSB41307 BSB50107 BSB51207	Cert IV in Advertising Cert IV in Business Sales Cert IV in Marketing Diploma of Advertising Diploma of Marketing
551211	Bookkeeper or Accounts Assistant	FNS30111 FNS30311 FNS40211	Cert III in Financial Services Cert III in Accounts Administration Cert IV in Bookkeeping
541112/ 611312/ 639311	Call, contact centre operator	BSB20211 BSB30211 BSB40311	Cert II in Customer Contact Cert III in Customer Contact Cert IV in Customer Contact
149211/ 149212	Call, contact centre managers	BSB40311 BSB50311	Cert IV in Customer Contact Diploma of Customer Contact
542111/ 542113/ 542114	Customer service, information and frontline inquiry officer	BSB30407 BSB40507 BSB50407	Cert III in Business Administration Cert IV in Business Administration Diploma of Business Administration
1321	Business owners and managers	BSB30307 BSB40407 BSB51107 BSB60207 BSB60407	Cert III in Micro Business Operations Cert IV in Small Business Management Diploma of Management Advanced Diploma of Business Advanced Diploma of Management
511111/ 511112	Contract, Program and Project Administrator or Manager	BSB41507 BSB51407 BSB60707	Cert IV Project Management Diploma of Project Management Advanced Diploma of Project Management
132111/ 111211	Corporate Services Manager	BSB50407 BSB60407	Diploma of Business Administration Advanced Diploma of Management
132111	Corporate Social Responsibility and Sustainability Manager	BSB51107 BSB60407	Diploma of Management, including Business Continuity and Sustainability units Advanced Diploma of Management, including Business Continuity and Sustainability units

ANZSCO	Occupation/Job Role	Training Package Qualification/Skill Set	
Business Services			
512299/ 599112	Court clerk or other legal support workers	BSB40110 BSB50110	Cert IV in Legal Services Diploma of Legal Services
541111	Frontline Supervisor or Manager	BSB40807 BSB50311	Cert IV Frontline Management Diploma of Customer Contact
531111	General Administrative Officer	BSB30407 BSB40507 BSB50407	Cert III in Business Administration Cert IV in Business Administration Diploma of Business Administration
111211	General Manager	BSB51107 BSB6020 BSB60407	Diploma of Management Advanced Diploma of Business Advanced Diploma of Management
599411/ 132311/ 223111/ 223311	Human Resources Administrator, Managers or Specialists including Organisation and Workforce Development	BSB41007 BSB50607 BSB60907	Cert IV Human Resources Diploma of Human Resources Management Advanced Diploma of Management (Human Resources)
224999	Knowledge and Information Manager – Data and Records	BSB40207 BSB41707 BSB50207 BSB51707 BSB60207 BSB60807	Cert IV in Business Cert IV in Recordkeeping Diploma of Business Diploma of Recordkeeping Advanced Diploma of Business Advanced Diploma of Recordkeeping
224712	Management and Organisation Analysts, including Quality and Compliance Auditors	BSB50407 BSB60407	Diploma of Business Administration Advanced Diploma of Management
225112	Market Research Analyst	BSB41307 BSB51207	Cert IV in Marketing Diploma of Marketing
512111/ 512299	Office and Practice Manager	BSB30307 BSB40207 BSB40407 BSB40507 BSB50207 BSB50807 BSB51507 BSB60207	Cert III in Micro Business Operations Cert IV in Business Cert IV in Small Business Management Cert IV in Business Administration Diploma of Business Diploma of Business Administration Diploma of Purchasing Advanced Diploma of Business
251312/ 132311	OHS Officer, Advisor or Manager	BSB30707 BSB41407 BSB51307 BSB60607	Cert III in Occupational Health and Safety Cert IV in Occupational Health and Safety Diploma of Occupational Health and Safety Advanced Diploma of Occupational Health and Safety
131114/ 225113	Social Media Advisor or Manager	BSB41307 BSB51207 BSB60507	Cert IV in Marketing Diploma of Marketing Advanced Diploma of Marketing including Digital Media and Technology Units

Note (1): Accountant and finance manager are listed as occupations in demand. Refer to IBSA's Financial Services Escan 2012 for detailed information on these occupations.

Note (2): 1324, Business owners and managers – access to Small Business Skill Sets, particularly those that include governance, was identified as a priority.

Note (3): 131114/225113, Social media advisor or manager – access to a digital literacy Skill Set was identified as a priority.

Appendix C – NCVER data

Data on publicly funded training activity is provided by NCVER. The tables should be read understanding that significant amounts of training also occurs outside the publicly funded VET system which may lead to under reporting of:

- fee for service training in national qualifications provided by private providers
- in house training in national qualifications delivered by enterprise RTOs, and
- non accredited training conducted in house or by external providers, eg vendor training.

Attempts to directly correlate commencements and completions should be avoided because:

- an enrolment is recorded for each year the course is active – multiple enrolments are recorded when a course is undertaken over more than one year, and
- completions are not uniformly reported, ie some jurisdictions only report completions when they award a certificate rather than a Statement of Attainment.

These factors may result in an over reporting of enrolments and under reporting of completions.

These tables do not include training package activity where totals are ten or less participants.

Table 3: Enrolments in Business Services (BSA/BSB) Qualifications 2007–2010

BSA/BSB Enrolments	2007	2008	2009	2010	Total
ADMINISTRATION					
BSA20197/BSA20100 – Certificate II in Business (Office Administration)	15	13	4	0	32
BSA30197/BSA30100 – Certificate III in Business (Office Administration)	35	8	1	0	44
BSB30201/BSB30407 – Certificate III in Business Administration	30,071	28,844	26,580	27,271	112,766
BSA40100/BSB40201/BSB40507 – Certificate IV in Business Administration	5,362	5,896	7,073	9,163	27,494
BSA50197/BSA50100/BSB50201/BSB50407 – Diploma of Business Administration	2,053	1,767	2,601	3,331	9,752
ADVERTISING					
BSB40601/BSB40107 – Certificate IV in Advertising	532	534	699	526	2,291
BSB50601/BSB50107 – Diploma of Advertising	528	456	482	436	1,902
BSB60501/BSB60107 – Advanced Diploma of Advertising	222	172	156	178	728
AUDITING					
BSB51904/BSB51607 – Diploma of Quality Auditing	137	48	101	248	534

BSA/BSB Enrolments	2007	2008	2009	2010	Total
BUSINESS					
BSB10101/BSB10107 – Certificate I in Business	10,600	9,241	4,760	4,138	28,739
BSB20101/BSB20107 – Certificate II in Business	36,525	35,188	32,297	33,105	137,115
BSB30101/BSB30107 – Certificate III in Business	11,403	11,922	13,294	16,579	53,198
BSB40101/BSB40207 – Certificate IV in Business	3,168	3,476	5,694	7,317	19,655
BSB50101/BSB50207 – Diploma of Business	4,661	5,344	3,365	4,161	17,531
BSB60207 – Advanced Diploma of Business	0	1	34	219	254
BUSINESS DEVELOPMENT/SALES					
BSB30301 – Certificate III in Business (Sales)	990	565	72	0	1627
BSB40607 – Certificate IV in Business Sales	0	22	637	1,039	1,698
BSB40501 – Certificate IV in Business Development	151	131	49	9	340
BSB50501 – Diploma of Business Development	57	123	45	0	225
BUSINESS MANAGEMENT (SEE ALSO FRONTLINE MANAGEMENT)					
BSB41101 – Certificate IV in Business Management	4,246	3,536	544	64	8,390
BSB50401 – Diploma of Business Management	5,487	5,423	1,344	304	12,558
BSB60201 – Advanced Diploma of Business Management	1,350	1,439	423	22	3,234
CUSTOMER CONTACT					
BSB20207 – Certificate II in Customer Contact	0	208	1,095	1,154	2,457
BSB30207 – Certificate III in Customer Contact	0	362	5,092	8,414	13,868
BSB40307 – Certificate IV in Customer Contact	0	9	440	1,498	1,947
BSB50307 – Diploma of Customer Contact	0	1	46	74	121
BSB60307 – Advanced Diploma of Customer Contact	0	0	12	12	24
E-BUSINESS					
BSB30601 – Certificate III in e-Business	341	326	23	41	731
BSB41201 – Certificate IV in e-Business	115	70	3	0	188
BSB51101 – Diploma of e-Business	173	15	8	0	196
BSB60701 – Advanced Diploma of e-Business	20	0	0	0	20
EDUCATION					
BSB30907 – Certificate III in Business Administration (Education)	0	61	335	345	741
EMPLOYMENT					
BSB41904 – Certificate IV in Business (Employment Services)	806	268	90	0	1,164

BSA/BSB Enrolments	2007	2008	2009	2010	Total
FRANCHISING					
BSB40707 – Certificate IV in Franchising	0	0	133	0	133
BSB50507 – Diploma of Franchising	0	17	0	11	28
FRONTLINE MANAGEMENT					
BSB30501/BSB30504 – Certificate III in Business (Frontline Management)	1,756	1,374	772	1,260	5,162
BSB41001/BSB41004/BSB40807 – Certificate IV in Frontline Management	7,693	8,776	11,118	12,822	40,409
BSB51001/BSB51004 – Diploma of Business (Frontline Management)	3,737	3,334	947	200	8,218
BSB51107 – Diploma of Management	0	555	9,127	19,013	28,695
BSB60407 – Advanced Diploma of Management	0	51	1,282	2,410	3,743
GOVERNANCE					
BSB40901/BSB40907 – Certificate IV in Governance	457	492	332	79	1,360
BSB41907 – Certificate IV in Business (Governance)	0	16	88	215	319
BSB50901/BSB50707 – Diploma of Business (Governance)	43	58	53	16	170
HUMAN RESOURCES					
BSB40801/BSB41007 – Certificate IV in Human Resources	3,412	3,707	4,090	4,261	15,470
BSB50801/BSB50607 – Diploma of Human Resources Management	3,892	4,316	4,142	4,319	16,669
BSB60301/BSB60907 – Advanced Diploma of Management (Human Resources)	296	284	273	404	1,257
INTERNATIONAL TRADE					
BSB30804/BSB30607 – Certificate III in International Trade	37	118	147	131	433
BSB42004/BSB41107 – Certificate IV in International Trade	615	481	656	687	2,439
BSB52004/BSB50807 – Diploma of International Business	1,372	1,931	1,626	1,514	6,443
LEGAL					
BSA30200/BSB31007 – Certificate III in Business Administration (Legal)	933	994	1,445	1,289	4,661
BSA40200/BSB41207 – Certificate IV in Legal Services	300	229	456	466	1,451
BSA50200/BSB51007 – Diploma of Legal Services	236	274	243	178	931
MARKETING					
BSB40701/BSB41307 – Certificate IV in Marketing	3,073	2,910	2,819	2,580	11,382
BSB50701/BSB51207 – Diploma of Marketing	2,799	2,516	2,217	2,026	9,558
BSB60601/BSB60507 – Advanced Diploma of Marketing	852	763	674	598	2,887

BSA/BSB Enrolments	2007	2008	2009	2010	Total
MEDICAL					
BSB30704/BSB31107 – Certificate III in Business Administration (Medical)	1,651	1,967	3,267	3,593	10,478
MICRO BUSINESS					
BSB30307 – Certificate III in Micro Business Operations	0	31	932	872	1,835
OH&S					
BSB31606/BSB30707 – Certificate III in Occupational Health and Safety	167	407	905	909	2,388
BSB41604/BSB41407 – Certificate IV in Occupational Health and Safety	3,832	4,229	5,487	7,485	21,033
BSB51604/BSB51307 – Diploma of Occupational Health and Safety	1,016	1,187	1,654	2,847	6,704
BSB61004/BSB60607 – Advanced Diploma of Occupational Health and Safety	159	146	179	256	740
PROJECT MANAGEMENT					
BSB41504/BSB41507 – Certificate IV in Project Management	1,199	1,726	2,226	3,237	8,388
BSB51504/BSB51407 – Diploma of Project Management	2,211	2,828	3,253	4,614	12,906
BSB60904/BSB60707 – Advanced Diploma of Project Management	28	63	60	145	296
PURCHASING					
BSB41404/BSB41607 – Certificate IV in Purchasing	171	184	142	182	679
BSB51404/BSB51507 – Diploma of Purchasing	70	80	79	117	346
RECORDKEEPING					
BSB30401/BSB30807 – Certificate III in Recordkeeping	191	219	165	146	721
BSB40301/BSB41707 – Certificate IV in Recordkeeping	154	111	66	73	404
BSB51707 – Diploma of Recordkeeping	41	19	43	27	130
SMALL BUSINESS MANAGEMENT					
BSB40401/BSB40407 – Certificate IV in Small Business Management	8,838	7,961	8,313	9,048	34,160
UNIONISM					
BSB41804/BSB41807 – Certificate IV in Unionism and Industrial Relations	17	57	8	3	85
Total	170,300	169,880	176,825	207,683	724,688

Source: NCVER VET Provider Collection 2011

Table 4: Qualifications issued in Business Services (BSA/BSB) 2007–2010

BSA/BSB Qualifications Issued	2007	2008	2009	2010	Total
ADMINISTRATION					
BSA20197/BSA20100 – Certificate II in Business (Office Administration)	2	7	4	0	13
BSA30197/BSA30100/BSB30201/BSB30407 – Certificate III in Business Administration	7,641	8,125	7,936	7,604	31,306
BSA40197/BSB40201/BSB40507 – Certificate IV in Business Administration	1,264	1,552	1,875	1,999	6,690
BSA50197/BSA50100/BSB50201/BSB50407/BSA40197 Diploma of Business Administration	836	1,237	1,139	985	4,197
ADVERTISING					
BSB40601/BSB40107 – Certificate IV in Advertising	190	171	278	148	787
BSB50601/BSB50107 – Diploma of Advertising	149	142	150	150	591
BSB60501/BSB60107 – Advanced Diploma of Advertising	138	58	63	88	347
AUDITING					
BSB51904/BSB51607 – Diploma of Quality Auditing	80	12	53	43	188
BUSINESS					
BSB10101/BSB10107 – Certificate I in Business	1,316	1,157	1,548	789	4,810
BSB20101/BSB20107 – Certificate II in Business	6,418	7,172	7,129	7,894	28,613
BSB30101/BSB30107 – Certificate III in Business	2,664	3,404	4,115	4,678	14,861
BSB40101/BSB40207 – Certificate IV in Business	667	1,003	1,531	2,051	5,252
BSB50101/BSB50207 – Diploma of Business	1,798	1,758	1,283	1,322	6,161
BSB60207 – Advanced Diploma of Business	0	0	8	36	44
BUSINESS DEVELOPMENT/SALES					
BSB30301 – Certificate III in Business (Sales)	286	259	42	0	587
BSB40501 – Certificate IV in Business Development	33	38	24	5	100
BSB40607 – Certificate IV in Business Sales	0	6	170	278	454
BSB50501 – Diploma of Business Development	11	12	26	0	49
BUSINESS MANAGEMENT (SEE ALSO FRONTLINE MANAGEMENT)					
BSB41101 – Certificate IV in Business Management	1,278	1,103	249	38	2,668
BSB50401 – Diploma of Business Management	1,700	1,663	490	76	3,929
BSB60201 – Advanced Diploma of Business Management	819	756	525	7	2,107

BSA/BSB Qualifications Issued	2007	2008	2009	2010	Total
CUSTOMER CONTACT					
BSB20207 – Certificate II in Customer Contact	0	138	272	766	1,176
BSB30207 – Certificate III in Customer Contact	0	48	1,147	2,626	3,821
BSB40307 – Certificate IV in Customer Contact	0	2	81	266	349
BSB50307 – Diploma of Customer Contact	0	2	4	28	34
E-BUSINESS					
BSB30601 – Certificate III in e-Business	112	53	12	1	178
BSB41201 – Certificate IV in e-Business	25	7	2	0	34
BSB51101 – Diploma of e-Business	106	11	3	51	171
BSB60701 – Advanced Diploma of e-Business	92	0	0	0	92
EDUCATION					
BSB30907 – Certificate III in Business Administration (Education)	0	18	95	130	243
EMPLOYMENT					
BSB41904 – Certificate IV in Business (Employment Services)	112	63	28	0	203
FRONTLINE MANAGEMENT					
BSB30501/BSB30504/BSB31207 – Certificate III in Frontline Management	408	598	405	338	1,749
BSB41001/BSB41004/BSB40807 – Certificate IV in Frontline Management	2,353	2,834	2,617	3,394	11,198
BSB51001/BSB51004 – Diploma of Business (Frontline Management)	1,520	1,318	506	33	3,377
BSB51107 – Diploma of Management	0	222	2,803	5,472	8,497
BSB60407 – Advanced Diploma of Management	0	37	397	912	1,346
GOVERNANCE					
BSB40901/BSB40907 – Certificate IV in Governance	148	118	156	16	438
BSB41907 – Certificate IV in Business (Governance)	0	0	33	63	96
BSB50901/BSB50707 – Diploma of Business (Governance)	8	16	30	9	63
HUMAN RESOURCES					
BSB40801/BSB41007 – Certificate IV in Human Resources	891	964	986	865	3,706
BSB50801/BSB50607 – Diploma of Human Resources Management	1,120	1,359	1,275	1,042	4,796
BSB60301/BSB60907 – Advanced Diploma of Management (Human Resources)	147	140	144	135	566

BSA/BSB Qualifications Issued	2007	2008	2009	2010	Total
INTERNATIONAL TRADE					
BSB30804/BSB30607 – Certificate III in International Trade	12	39	46	53	150
BSB42004/BSB41107 – Certificate IV in International Trade	215	201	215	220	851
BSB52004/BSB50807 – Diploma of International Business	249	270	377	410	1,306
LEGAL					
BSA30200/BSB31007 – Certificate III in Business Administration (Legal)	233	308	346	397	1,284
BSA40200/BSB41207 – Certificate IV in Legal Services	62	56	142	125	385
BSA50200/BSB51007 – Diploma of Business (Legal Services)	64	101	147	107	419
MARKETING					
BSB40701/BSB41307 – Certificate IV in Marketing	783	775	918	716	3,192
BSB50701/BSB51207 – Diploma of Marketing	856	717	878	762	3,213
BSB60601/BSB60507 – Advanced Diploma of Marketing	404	422	499	251	1,576
MEDICAL					
BSB30704/BSB31107 – Certificate III in Business Administration (Medical)	412	481	888	896	2,677
MICRO BUSINESS					
BSB30307 – Certificate III in Micro Business Operations	0	0	389	386	775
OH&S					
BSB31606/BSB30707 – Certificate III in Occupational Health and Safety	8	59	70	104	241
BSB41604/BSB41407 – Certificate IV in Occupational Health and Safety	926	1,141	1,339	2,150	5,556
BSB51604/BSB51307 – Diploma of Occupational Health and Safety	414	502	647	829	2,392
BSB61004/BSB60607 – Advanced Diploma of Occupational Health and Safety	69	50	60	107	286
PROJECT MANAGEMENT					
BSB41504/BSB41507 – Certificate IV in Project Management	622	1,038	1,127	1,631	4,418
BSB51504/BSB51407 – Diploma of Project Management	874	1,169	1,576	1,722	5,341
BSB60904/BSB60707 – Advanced Diploma of Project Management	44	48	31	43	166
PURCHASING					
BSB41404/BSB41607 – Certificate IV in Purchasing	68	76	60	77	281
BSB51404/BSB51507 – Diploma of Purchasing	26	15	40	27	108

BSA/BSB Qualifications Issued	2007	2008	2009	2010	Total
RECORDKEEPING					
BSB30401/BSB30807 – Certificate III in Recordkeeping	62	74	72	24	232
BSB40301/BSB41707 – Certificate IV in Recordkeeping	61	35	16	17	129
BSB50301/BSB51707 – Diploma of Recordkeeping	19	4	11	5	39
SMALL BUSINESS MANAGENET					
BSB40401/BSB40407 – Certificate IV in Small Business Management	1,974	1,648	2,214	2,889	8,725
UNIONISM					
BSB41804/BSB41807 – Certificate IV in Unionism and Industrial Relations	3	32	5	3	43
Total	42,792	46,845	51,747	58,300	199,684

Source: NCVET VET Provider Collection 2011

