THE MCKELL INSTITUTE

Options paper:

Incentivising tradeswork and shiftwork post COVID-19

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The McKell Institute is an independent, not-for-profit research organisation dedicated to advancing practical policy solutions to contemporary issues.

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Introduction

2020 fundamentally changed the way millions of Australians lived and worked. However, much of the discourse during 2020 was focused on two key shared experiences:

1. The first was a transition from office work to working-from-home (WFH). This was common among professional and media circles – reflecting the nature of those involved in these industries.
2. The second shared experience is that of those who experienced being stood down, or not working at all during the pandemic.

But there is a third cohort of workers whose experience during the pandemic is often overlooked. These 'forgotten workers' are the tradeworkers, apprentices, shiftworkers and technical employees who continued to perform their roles in a conventional manner as the economy radically transformed around them.

These workers share a requirement to work 'on site' and often during non-standard hours. During COVID-19, these workers:

- Suffered a greater reduction in earnings than other employees due to reduced hours
- Recovered at a slower rate than professional service workers
- Experienced increasing industry-wide skills shortages, escasserbated by the pandemic, which risk our economic recovery
- Faced a greater risk of contracting COVID-19 due to working on-site and commuting
- Do not have access to the flexibility and adaptability of other professions

The pandemic confirmed the essential nature of these workers and yet it exposed a divide in the flexibility and adaptability among professions. These factors combined to reduce the appeal of tradeswork and shiftwork compared to other professions. To correct this imbalance decisionmakers must introduce policy to support this workforce.

Tradespersons, STEM professionals and hospitality workers are in greatest demand according to businesses.[1] These skills shortages have been longstanding and heavily rely on apprenticeships and vocational training. Despite the demand, apprenticeship commencements are at their lowest levels since the mid 1990's.[2] If the relative burden of shiftwork and tradeswork continues to increase relative to other career options, these shortages will be exacerbated.

This report examines the experience of this segment of the workforce during COVID-19, and outlines a policy agenda that will provide support for these professions so that they remain an attractive career in future.

Key Findings

1. Most Australian workers did not consistently work-from-home during the pandemic. The number of Australians working from home peaking at 32 per cent.

2. Technicians and trade workers suffered a greater decrease in hours worked during 2020 than professionals and manager, 8.5 per cent and 4 per cent respectively.

3. By December 2020, tradespeople, apprentices and labourers based in Greater Sydney were earning $143 million less each week due to the COVID-19 economic downturn.

4. 15.6 per cent of Australians work shift work regularly, with a greater number working flexible hours or have other working arrangements.

5. Shift workers had a higher risk contracting COVID-19 while going to work in 2020 with night shift workers twice as likely to catch COVID-19 as day-shift workers, regardless of whether or not they worked in healthcare.[3]

6. Increases in the cost of tradeswork and shiftwork relative to other professions will reduce the labour-force demand for work in these industries, exacerbating skills shortages and risking the economic recovery.

7. Policy interventions that introduce greater flexibility and support for this cohort of the workforce will support NSW's post-COVID economic recover and help stimulate economic growth.

Recommendations

Making Early Childhood Education & Care More Accessible

1. The Federal and NSW Governments should allocate $3.8 million to trial at least one 24-hour childcare program for a minimum of two years to be delivered by a Local Council with a large number of shift and night workers.
2. The Federal Government should allocate $48.5m to increase the amount of in-home care (IHC) places available to 8,500 to cover all shift workers with children who have the most complex needs.

Minimising the Cost-Burdens on Workers who Drive

3. The NSW Government should allocate approximately $40 million to expand the Toll Relief Program to include a commercial vehicle registered to a tradesperson operating as a sole trader.
4. The Professional driver demerit point scheme should be expanded to include tradespeople and apprentices who regularly work in more than one location.

Making Public Transport More Affordable & Accessible

5. The NSW Government should commit $50 million to trial a 24-hour public transport network, similar to the Melbourne Night Network trial that took place in 2016.
6. The NSW Government should allocated $63 million to expand the eligibility of the concession opal card to include shift workers, especially those in essential public services such as healthcare.

Ensuring Small Businesses Are Paid on Time

7. The NSW Government should legislate a SME Payment Support Package including: a Prompt Payment Code and a new platform for SME’s to report late payments on a publicly available register.
8. The NSW Government should legislate project bank accounts to ensure payments to small businesses are made available when needed. These accounts should be opened prior to the commencement of work.

Encouraging the Uptake of Apprentices & Trainees

9. The Federal Government should negotiate a five-year, long term partnership agreement with the states and territories for the funding of vocational education to match the pre-2011 level of funding per capita.
10. The NSW Government should allocate $11 million per year to make TAFE free for courses in professions with a skills shortage for the five-year period of the partnership agreement in recommendation 9.

Part One: The Experience of Australia's 'Forgotten Workers'

During the COVID-19 pandemic, there have been two shared experiences that have dominated much of the discourse in Australian media circles. The transitions that many workers made due to government-enforced lockdowns and the threat of the pandemic was the most prominent of these. This discourse focused on the dramatic increase in the number of workers working-from-home (WFH). It introduced concepts such as *Zoom* meetings, "iso" and even "virtual drinks" into common parlance.

While coversations highlighting this transition have dominated discussion, most Australians were unable to work from home. During the pandemic, the number of Australian WFH employees increased to a peak of 4.3 million (1.32 million in NSW), representing only 32% of the workforce.[4] While this is significantly higher than usual, it does not represent a common shared experience, but rather the experience of a minority.

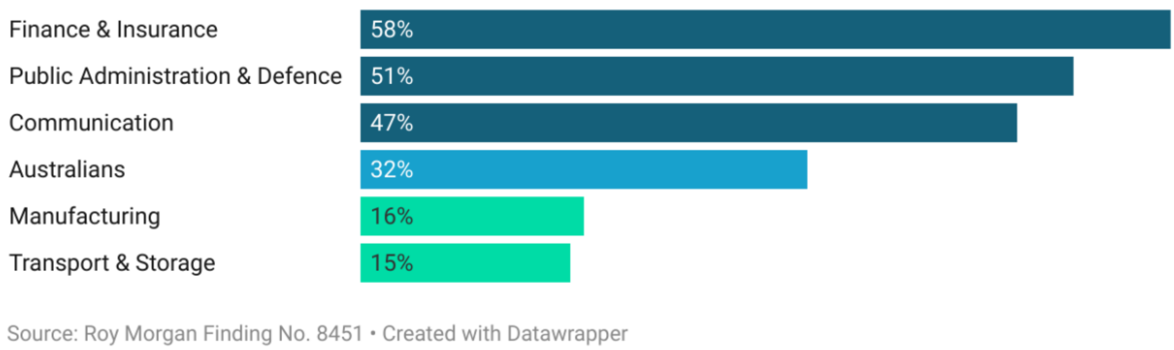

Figure 1: Percentage of employees working from home by industry

The second shared experience is that of the sectors that have been hit the hardest by the economic disruption caused by the pandemic. Sectors such as hospitality, tourism, arts and recreational services have been subject to a disproportionate impact as a result of COVID-19 restrictions. These industries shifted onto JobKeeper and have still not recovered to their pre-lockdown normal.

This report, however, examines the experience of those who have avoided these shared experience – a segment of the workforce this report describes as the 'forgotten workers'. While often retaining employment, this segment of the workforce were unable to work from home, suffered reduced incomes and hours-worked, and faced a higher degree of exposure to the pandemic simply by continuing to perform their jobs. Because their economic plight has not been as acute as trhe most severely impacted workers, this labour market segment has received minimal attention and support from policymakers.

Within New South Wales, this group of 'forgotten workers' is sizeable, and includes the 860,000 NSW based tradespeople, apprentices and labourers who constitute almost a third of NSW's 2.910 million workers. The second group are shift workers in the private and public sector who make up aproximatly 16 per cent of all employees.[5] These include workers in health, emergency services, security, transport, logistics, and other private industries.

Tradespeople suffered severe earnings decline due to reduced working hours

During 2020, Australia experienced its most significant economic downturn since the Great Depression, imposed by the COVID-19 pandemic, and the necessary restrictions that aimed to curtail the spread of the virus. In NSW, that economic patten tended to follow that of Australia generally, albeit with the state experiencing a slightly deeper recession and a faster recovery (see *Figure 2).*

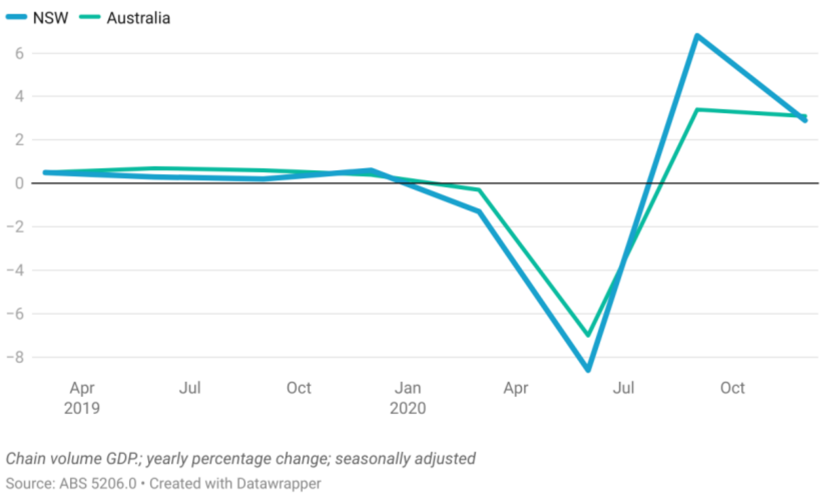

Figure 2: GDP growth in NSW, Australia

As the economy declined into April, May and June of 2020, firms had to make arrangements for their staff. As shown below in *Figure 3,* some professions experienced only modest adjustments to their hours-worked. However, technicians and trade workers were among those who suffered a sharp decrease in the hours worked, and have experienced a slower recovery. As a result many tradespeople, apprentices, trainees and labourers experienced sharp declines in weekly household income during the pandemic.

Figure 2: Index of hours worked by type of occupation

Location	Post pandemic weekly income at 2 January 2021	Post pandemic weekly income loss at 2 January 2021
Sydney - South West	$ 61,916,030	$ (14,523,513)
Sydney - Blacktown	$ 53,054,759	$ (12,444,944)
Parramatta	$ 2,672,973	$ (626,994)
Sydney - Outer West and Blue Mountains	$ 50,760,586	$ (11,906,804)
Greater Sydney	$ 584,035,524	$ (136,995,987)
New South Wales	$ 959,929,213	$ (225,168,581)
Australia	$ 3,211,116,752	$ (753,224,917)

Figure 4:Weekly income lost since start of pandemic (14 March 2020)

Apprenticeship and traineeship uptake has declined to its lowest levels on record

The challenges imposed on this segment of the workforce are compounded by the low rate of appenticeships and traineeships being undertaken within New South Wales, despite tradespersons, STEM professionals and hospitality workers being in demand according to businesses.[6] These skills shortages have been longstanding.

To address these shortages, policymakers should incentivise a strong uptake of apprenticeshgips and traineeships. Yet, despite the demand, apprenticeship commencements in 2021 were at their lowest levels since the mid 1990's.[7] This has followed a long term trend[8] only excasserbated by COVID-19.[9] While recent Government incentive schemes have increased enrolments, it's clear that long term, structural incentives are needed to encourage the uptake of apprenticeships and traineeships.

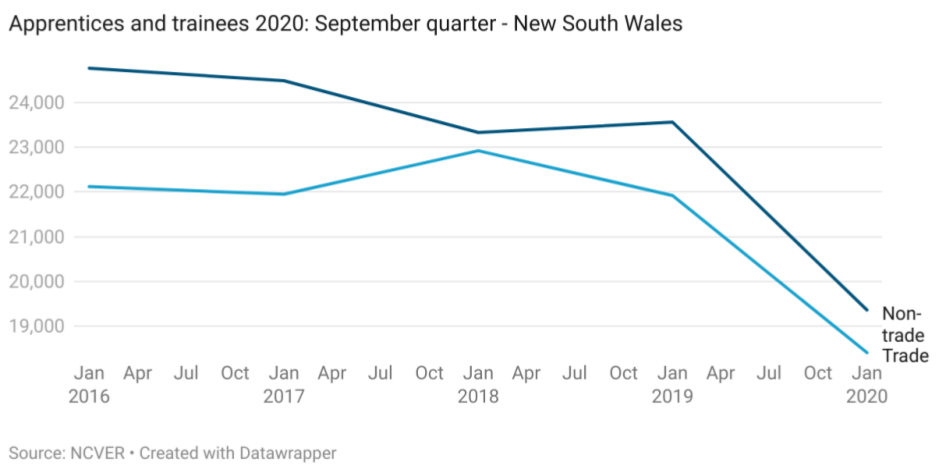

Figure 5: Commencements of Apprentices and Trainees in NSW – 2016 to 2020

The Commonwealth Government has made recent announcements to boost the number of apprentice and trainee jobs.[10] These announcements, and how the NSW Government can support and build upon them, are considered in detail in Part 2(5) of this report.

Shift workers have been working more hours under deteriorating conditions

Those who are in 'shift work' generally work in industries where there is an expectation that services are provided 24 hours a day, 7 days a week. This includes key public services such as healthcare, emergency services and police. It also includes private industries such as security, energy and logistics. According to the latest ABS data, shift workers cover 15.6 per centof the labour market.[11] As such, it can be estimated that there are approximately 643,000 shiftworkers in New South Wales.[12]

A broader definition also includes those who engage in other working time arrangements. This includes those Australian workers who usually work overtime (35.4 per cent), who are usually on call or standby (22 per cent) or work flexible hours (15.6 per cent).

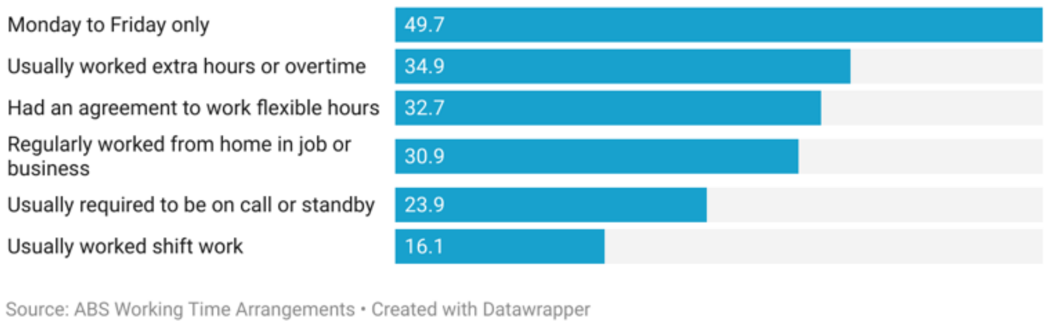

Figure 6: Fraction of Australians with 'non-standard' working time arrangements (%)

Research has established that shift work carries safety risks and health impacts, including an increased risk of COVID-19 infection.[13] A recent study from James Cook University using UK data found that the risk of infection doubled for night shift workers compared to day shift workers, even in non-healthcare related fields.[14]

Many of the shift workers in New South Wales and across Australia were employed in industries providing essential support during the pandemic . These services couldn't have been managed at home, and so shift workers had to continue commuting and attending work even during lockdown periods. This ultimately means that these workers did not experience the same flexibility that comes with working-from-home arrangements

Relative benefit and costs of trades and shiftwork impacts labour-force demand

During the course of COVID-19, white-collar work has benefited from increasing flexibility and lower commuting and other costs. As this has happened, the commuting costs for the forgotten workers have remained the same, as they have experienced no increased flexibility.

This disparity, if not addressed, could disincentivise workers from going into trades or shift work, as a worker may find that the comparative total benefit is less worthwhile. This can be articulated in the following model. If w be wage, b be non-wage benefit of working in a particular industry and c be non-wage cost, then this report can define the total benefit (**TB**) of working in a particular industry as:

$$\boldsymbol{TB_i = w_i + b_i - c_i}$$

where i is the type of industry worked in.

As the non-wage benefits of white-collar work increase, while the non-wage costs decrease, it becomes more likely that for any worker:

$$\boldsymbol{TB_F = w_F + b_F - c_F < w_W + b_W - c_W = TB_W}$$

If F is forgotten worker industries, and W is white-collar work, total benefits of working in varying sectors can be identified. Even a 10 per cent increase in the non-wage costs (such as the total cost of commuting in a single year) will result in a higher probability that $TB_F < TB_W$. Therefore, the total labour-market demand for work in the forgotten-worker industries will decrease.

The benefit of various forms of work will always impact the take up of those careers. These workers are essential for a well-functioning society and economy. As such, ideas are needed to reductions in labour demand for these industries. A reduction in trades and shiftworkers will excasserbate skills shortages and risk the economic recovery.

Part Two: Supporting NSW's Forgotten Workers

Tradespeople and shiftworkers were uniquely impacted by COVID-19. These workers:

- Suffered a greater reduction in earnings than other employees due to reduced hours
- Recovered at a slower rate than professional service workers
- Experienced increasing industry-wide skills shortages, exacerbated by the pandemic, which risks he state's economic recovery
- Faced a greater risk of contracting COVID-19 due to working on-site and communiting
- Do not have access to the flexibility and adaptability of other professions.

Changing patterns of work will impact on the decisions of workers to pursue different career paths. To address skills shortages and incentivise the vital work of tradespeople and shiftworkers, decision-makers will need to develop policy to support this workforce.

Part Two of this report details actionable policy recommendations that both the NSW and Federal Governments can implement in order to alleviate the pressures faced by these workers, and expedite the state's post-COVID-19 economic recovery.

This report highlights five policy priorities that will provide flexibility and reduce cost of living pressures for tradespeople and shiftworkers residing and working in NSW:

1. Improving access to affordable Early Childhood Education and Care
2. Minimising communiting costs for workers who drive
3. Minimising commuting costs for workers who use public transport
4. Addressing payment delays and cashflow uncertainty
5. Reducing barriers for apprentices

Priority 1: Improving access to Affordable Early Childhood Education and Care (ECEC)

Accessible childcare has significant economic and social benefits

ECEC allows parents to work, increases labour participation and productivity.[15] The economic return on investing in accessible ECEC may be up to $7 for every dollar invested.[16] Furthermore, accessible and affordable ECEC is also an important social good – allowing parents to work while their children receive care, attention and education. Accessible childcare benefits those Australians from disadvantaged backgrounds the most.[17] It also provides a direct benefit to women and aims to combat the disproportionately high number of women who work part-time compared to men.[18]

The McKell Institute's previous research have focused on the financial impost on families that childcare causes.[19] But financial burdens are not the only barriers to accessing ECEC - location and hours of operation can also provide obstacles for some families in accessing these services – particularly in communtiies with high concentrations of shift workers and those working non-standard hours.

Shift workers currently miss out on adequate child care options

The majority of early childhood services operate from 6am-6pm weekdays.[20] Shift-workers, particularly those who consistently work night shifts, are disproportionately disadvantaged by these conventional arrangements. In addition, shifts that start early and finish in the evening may make pick-up and drop-off difficult. The level of engagement with early childhood services is directly linked to the flexibility of working hours.[21]

Currently, in order for many shift workers to access care for their children, they have to rely on relatives, their partner, or have to simply reduce their hours at work. Parents make adjustments to their work situation in order to fit the care they have available to them – such as switching to part time, moving jobs or taking time off work.[22]

Increased Female Participation in the workforce is an ongoing goal of Australian governments

While Australia's female participation rate is higher than in some comparable OECD countries,[23] Australia rates highly among OECD nations for the proportion of women working part time. Around 37 per cent of employed women in Australia work fewer than 30 hours per week, which is well above the OECD average of 25 per cent and of New Zealand (31 per cent) and Canada (26 per cent).[24] Attaining higher rates of workforce participation is a goal of the Federal Government, which is informed by successive intergenerational reports demonstrating that a higher female participation rate will improve Australia's productivity and prosperity.[25]

The Findings of the Child Care Flexibility Trials

In 2013 and 2014, the Federal Government conducted Child Care Flexibility Trials. This effort was designed to create informed perspectives on flexible childcare and test a number of approaches to the delivery of flexible child care, with a specific 'focus on families whose needs did not fit with standard models of child care delivery'.

> "That's the thing. It's 6 am to 6 pm, and in the majority of your standard day care centres if you're late, the late fee is something like $15 a minute. For, say a shift worker … we might get a late callout at 5.30, taking you half an hour late, that's an absolute fortune. (Mother, partnered, under-school-aged child only)."
>
> "I suppose it's not really achievable to have someone go to every person's house, but for me that's the only solution that I can see to be able to keep the kids in their normal lifestyle … I mean, my husband and I signed up to be shift workers, not them." (Mother, partnered, school-aged and under-school-aged children on why she has elected for in-home care)

Quotes from the 2016 Child Care Flexibility Trials.[26]

Option 1: 24-hour childcare centres

This report proposes the introduction of 24-hour childcare centres, to be trialled by local councils in jurisdictions with demonstrably high numbers of shift workers and those who would benefit from more flexible childcare options.

There are 24/7 childcare centres in the Sydney CBD,[27] and Maitland.[28] International case studies demonstrate the efficacy of the 24-hour provision of childcare. Facilities run in New York City illustrate how 24/7 centers allow essential workers to continue participating in the economy, particularly during the pandemic.[29]

A recent survey in Sydney found that 90 per cent of respondents would benefit from a 24/7 child care centre. The survey conducted by Georges River Council supported the case for for a trial:

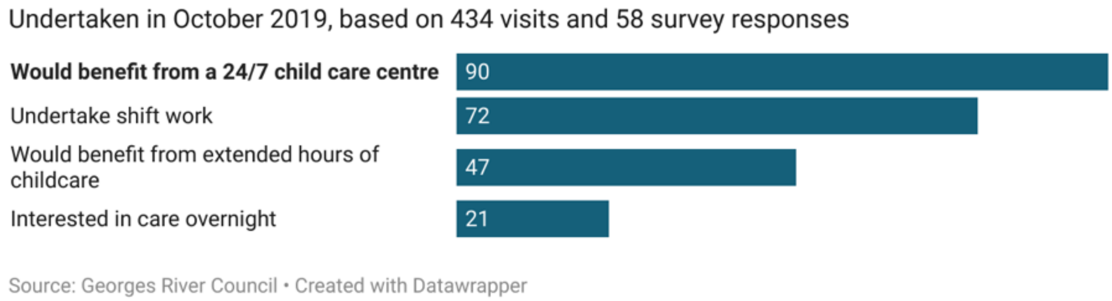

Figure 7: Results of Georges River Council Community consultation on providing 24-hour childcare

However, the Council did not proceed with the trial. The Council has not nominated a reason why, but uncertainty of demand for 24 hour care undermines the business case for the proposal.

To offer certainty, a trial must offer a fixed-term of funding for a minimuym of two years to provide certaiunty that a child can undertake their preschool education until they reach school age. The trial should be located in an area with a high number of shift workers and could potentially grow as community awareness increases.

Recommendation 1

The Federal and NSW Governments should allocate $3.8 million to trial at least one 24-hour childcare program for a minimum of two years to be delivered by a Local Council with a large number of shift and night workers.

Option 2: Expanding government-subsidised in-home care

Currently, *In Home Care* (IHC) is available to certain eligible families. It is a flexible form of childcare that allows those, such as shift workers, who work non-standard hours to have a carer in their home looking after their children.[30]

However, the eligibility criteria are strict – only offering a maximum of 3,200 IHC places at any one time. Families must meet at least one of the below eligibility criteria:

- "The parents or carers of the child are **working non-standard or variable hours**, outside of normal child care service hours.
- The parents or carers are **geographically isolated** from other types of approved child care, including because they live in a rural or remote location.
- The family has **challenging or complex needs**, such as a parent who's being treated for a serious illness, or a child with a disability whose ECEC needs can't be catered for in another approved child care setting or government-funded/community-based service'.

Current eligibility criteria for in-homecare[31]

IHC offers vital assistance for those families outside of regular hours. Current Government funding arrangement represents a miniscule amount of the total number of families with young children (1.4 million[32]). In 2018 the number of eligible families was increased from 3,000 to 3,500. Even when restricting the cohort to the 15.6 per cent of of workers engaged in shift work and aproximatly 3.4 per cent of children aged 0-4 living with some form of disability, the funded assistance is less than half of what is needed.[33]

Increasing the number of IHC places by 5,000 will be enough to ensure shift workers with children with complex needs, such as those with a disability, receive the access to childcare that they need.

It should be noted that 'in-home care' really refers to *paid* in-home care. Many families exercise in-home care all the time by calling to their aid grandparents or other relartives. Just over a quarter of Australian grandparents report providing regular care to their grandchildren.[34] As such, IHC places can be viewed as supplanting that need when the grandparents are not available.

Recommendation 2

The Federal Government should allocate $48.5m to increase the amount of in-home care (IHC) places available to 8,500 to cover all shiftworkers with children who have the most complex needs.

Priority 2: Minimising commuting costs for workers who drive

As outlined in *Part One,* those working in professional and service-based industries were largely able to work from home during the pandemic. As such, they encountered the benefits of lower commuting costs. This meant that the forgotten workers have continued to bear the brunt of the cost of driving in Sydney, while others have received an effective saving.

Tradespeople, apprentices and shift workers have been driving more per hour worked

Tradespeople and apprentices are concentrated in Western Sydney. As shown in *Figure 8,* Western Sydney suburbs have a higher concentration of trade workers, who are engaged in frequent commuting. Western Sydney has a lower percentage of 'professional' workers, who are more likely to work from home.

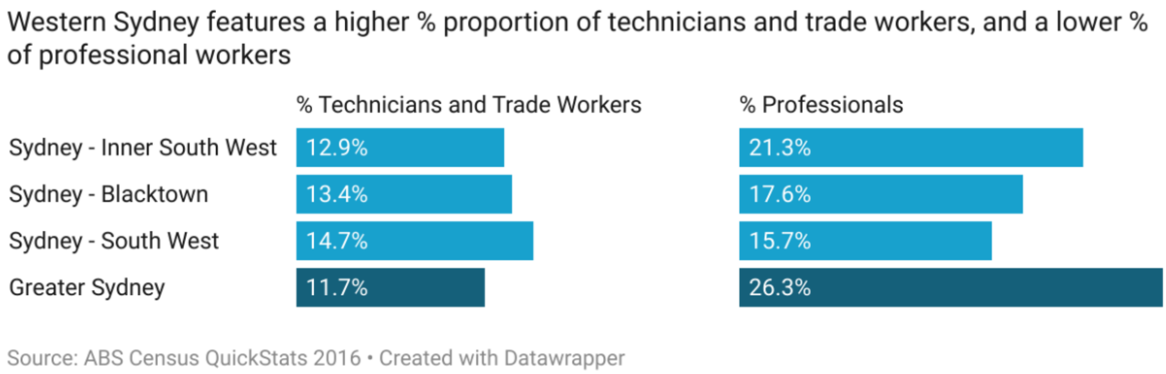

Figure 3: Fraction of workers in occupation by key statistical areas (%)

Toll roads impose additional cost of living pressures on workers

In addition, the costs of tolls are set to rise. WestConnex tolls, which will account for a growing percentage of Sydney's daily commuter traffic, will rise by 4 per cent per year for the next 20 years.[35] This far exceeds the rate of inflation, and will likely impose higher cost-of-living pressures on workers reliant on commuting.

Sydney now has 12 of Australia's 21 tolled roads.[36] As Chinh Ho, a senior lecturer at the University of Sydney's Institute of Transport Logistic Studies has found, "In terms of the kilometres of tolls in the urban area, Sydney has the most in the world".[37] The result is Sydney commuters spending more than $1.5 billion on tolls each year.[38]

This cost burden is poorly distributed throughout Sydney's suburban area, and through its demographics. Western Sydney residents, for example, disproportionately use Sydney's toll roads – meaning that tradespeople in Sydney are bearing an unfair burden of toll costs. 60 per cent of those in Western Sydney commute outside of Western Sydney for work.[39] Data on household expenditure on tolls shows that Western Sydney suburbs are paying significantly more for tolls than those in the inner metro region.[40]

Speeding and parking fines are unevenly distributed between labour market segments

In the second half of 2020, there were more than 482,008 speed camera offences in New South Wales.[41] This represents a near-doubling of the figure from the corresponding period in 2019 of 229,563. Controversially, since last December, NSW Roads and Maritime Services no longer has provided warnings for speed cameras.[42] A report from 9 News has noted this had resulted in a significant increase to revenue from mobile speed cameras – increasing revenue from $400,000 in 2019 to $2.5m.

Repeating the pattern demonstrated above, there appears to be an unfair burden of fine collection from suburbs in Western Sydney, representing over half of the top speeding fine hotspots

Speeding fine hotspot	Monthly number of fines	Location
Penshurst St, Chatswood (northbound)	398 fines worth $77,088	Metro Sydney
Hume Highway, Casula (southbound) –	335 fines worth $80,446	Sydney South-West
King Street, Warrawong (southbound)	275 fines worth $58,161	Regional
Docker St, Wagga Wagga (northbound)	218 fines worth $35,334	Regional
Pennant Hills Road, Carlingford (southbound)	184 fines worth $38,820	Sydney North-West
Excelsior Parade, Toronto (westbound)	174 fines worth $29,542	Regional
Greater Western Highway, Colyton (westbound)	160 fines worth $30,412	Sydney West
Blacktown Rd, Blacktown (eastbound)	147 fines worth $29,523	Sydney South-West
Pacific Highway, Tuggerah (northbound)	144 fines worth $27,034	Regional
M31 Hume Motorway, Ingleburn (southbound)	140 fines worth $41,708	Sydney South-West

Table 1: Speeding fines and volume disparity by location during December 2020[43]

Option 1: Expanding toll relief

Currently, NSW Toll Relief offers one free 12-month registration for those who spend $1,352 or more on tolls in the previous financial year. However, it is only available to privately registered vehicles.[44] In order to provide assistance to tradespeople, it should be expanded to include *small business* vehicles as well, meaning that the small business can claim toll-relief on the registration of its vehicles. This would ameliorate some of the disproportionate costs identified above for tradespeople, and other workers heavily reliant on traveling between jobs using vehicles owned by their small business employer, and allow them to commute within metropolitan Sydney without an unfair burden of a high number of tolls.

Currently, small businesses may be able to deduct the cost of these tolls from their company tax liability. [45] The expansion of toll relief will, however, provide a greater stimulus to the cashflow of small businesses. Eligible small businesses will forego the registration costs of one or potentially more of their vehicles. This will directly improve the balance sheet of small businesses, freeing up funds to be spent on hiring another apprentice, or potentially investing in capital expenditure. As such, this reform will give an economic boost to small business.

Recommendation 3

The NSW Government should allocate approximately $40 million to expand the Toll Relief Program to include a commercial vehicle registered to a tradesperson operating as a sole trader.

Option 2: Demerit point reform

Currently, those on an unrestricted licence who reach or go over 13 demerit points will have their licence suspended. The NSW Government since 2011 has raised the threshold to 14 demerit points for 'professional drivers'.

Currently professional drivers are defined as follows:

- Motor vehicle driver who transports goods either inter and/or intra-state, or
- Bus, taxi or hire car driver who holds an authority issued under the *Passenger Transport Act 1990*.

The following conditions apply:

- You must earn an income for the driving work and drive more than 20 hours per week. Volunteer drivers do not qualify
- You must have been a professional driver on the date of your last demerit point offence and on the date the notice of suspension was given (or the date you were refused a licence).[46]

The definition and further explanation explicitly rule out the potential of tradespeople and apprentices from being included in the scheme.

As it stands, the scheme is needlessly arbitrary and should be expanded. All workers who drive often, who drive frequently and who drive as part of their job should be allowed to access this scheme. This should include tradespeople and apprentices, and any other workers, where it can be showsn that they are driving to multiple places of work.

Tradespeople driving between different jobs all over Sydney are subject to the unfair burden of those speed cameras mentioned above, specifically those in Western Sydney.

Recommendation 4

The Professional driver demerit point scheme should be expanded to include tradespeople and apprentices who regularly work in more than one location.

Priority 3: Minimise commuting costs for workers who use public transport

As outlined in Part One, the *Forgotten Workers* had a signature shared experience. While other workers were stood down, or shifted to working remotely – they continued to make their way to their job, client or shift by commuting through NSW. In Greater Sydney, this meant that they continued to be exposed to some of the longest weekly commuting times. In non-COVID-19 times, Sydney has the longest average daily commute of 71 minutes.[47]

The impact of the COVID-19 pandemic on Greater Sydney public transport

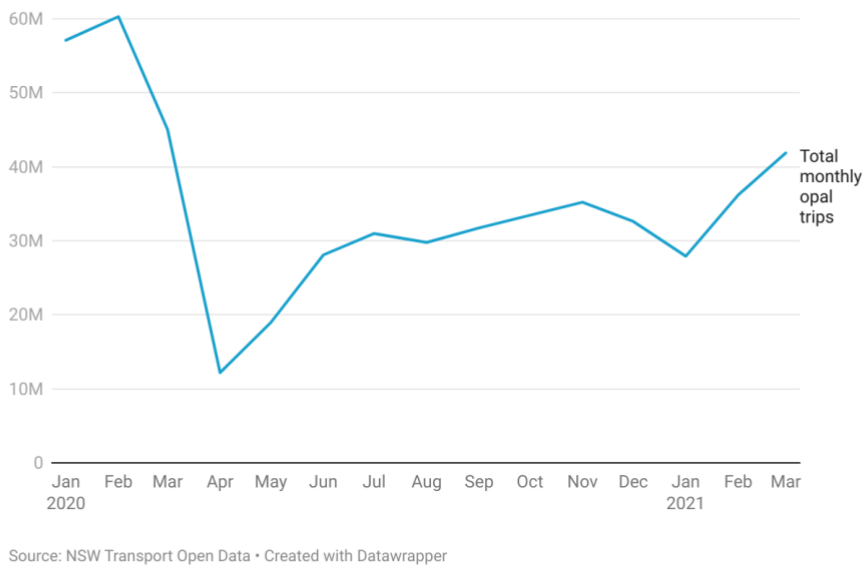

Figure 4: Sydney public transport usage has plummeted during COVID

A tale of two cities

Further, as shown in Figure 9 in 2021 those in Western and South-Western Sydney did not experience an increase in working from home. As such, the tradespeople and shift workers in these areas largely did not benefit from any large COVID-19 downturn in traffic or commuting times.

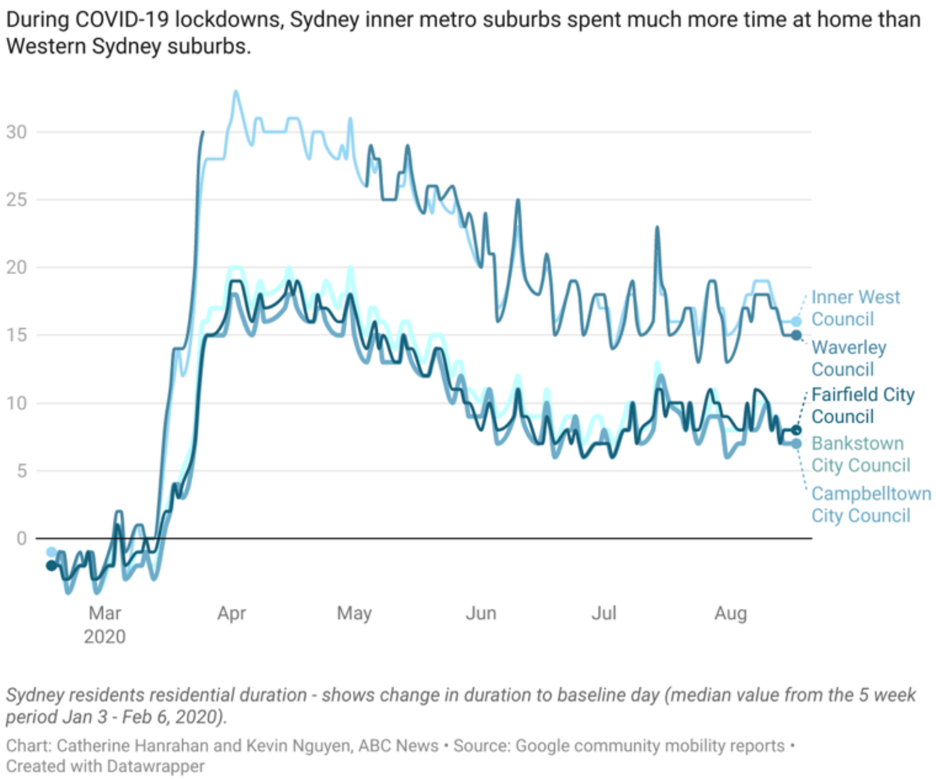

Figure 5: Time spent at home in Sydney Local Government Areas (LGAs)

Analysis by the ABC of NSW Transport information in August 2020 revealed the differing effects that the COVID-19 pandemic on the use of public transport.

While overall the use of public transport was down on the peak, those in more affluent suburbs are staying home more, and using less public transport, while those in Western Sydney were commuting *more* and spending comparatively less time at home.

Australians in 'white-collar' jobs therefore found automatic reduction in spending resulting from no longer paying for public transport. In addition, they found additional hours in the day. Meanwhile, shift workers, tradespeople and labourers – whose work depends upon their physical presence found that they were rewarded with no such discount in their workplace.

The utility of Sydney's public transport network is limited for those working non-standard hours

There are two key limitations of Greater Sydney's public transport network as to how it caters for those who are working non-standard hours.

First, the network does not sufficiently provide for non-standard hours. Most train services do not run between midnight and 4.30am. Bus services are limited during the evening, with most bus routes shutting down during the later evening hours.[48]

Second, the system of fares (Opal) does not provide a sufficient financial discount for travelling off-peak. The NSW Government has also recently announced that it is removing a portion of the concession available when travelling off-peak. This will result in a 10 per cent increase in real terms for the cost of public transport for shift workers who utilise public transport outside of the conventional time slots.[49]

Option 1: 24-hour public transport

Shift workers should be able to know that they can commute to work via public transport, no matter the hours they're rostered onto. This guarantee only comes from embracing the public transport through the evenings and having at least some of the train and bus network operating 24 hours a day.

In London, the NightTube has operated since 2016. The service supports the city's nighttime economy – which includes transport, storage, health and care workers.[50] The service was shut down during the COVID-19 pandemic, a decision that was heavily criticised by NHS and other health care workers.[51] This shows the extent to which the NightTube became relied upon to transport those working non-standard hours across the city.

In Melbourne, the Night Network has operated since 2016. After a one-year trial, it was made permanent in 2017.[52] Of particular note was that more than 20% of the network's users during the initial trial were shift workers, with the additional demand being used by tourists and evening revellers.

The provision of 24-hour public transport services in Sydney would not only support shift-workers, but also support Sydney's night-time economy. The recent NSW Treasury 24 Hour Economy Strategy enthusiastically endorsed more evening transport options.[53] This follows the groups such as the Sydney Business Chamber and the Greater Sydney Commission calling for such a reform.[54]

Recommendation 5

The NSW Government should commit $50 million to trial a 24-hour public transport network, similar to the Melbourne Night Network trial that took place in 2016.

Option 2: Expansion of Opal concession cards

Currently the Concession Opal is eligible to students, apprentices and trainees as well as those receiving certain income support payments. The concession opal card provides a discount compared to the standard Opal fare, with a further concession available when travelling off-peak.[55]

Recognising and encouraging shift workers, especially those in the healthcare sector, has been done elsewhere. Since the beginning of COVID-19, the Adelaide State Government has offered free hospital travel to those on public transport.[56]

The NSW State Government has been criticised for going back to ordinary practice of charging hospital workers to park at their hospitals.[57] It may be that the State Government has done so to restore a 'price signal' on NSW hospital parking. As such, if restoring free parking at hospitals is undesirable for the State Government, they should consider expanding the eligibility of the concession Opal card. The expansion would incentivise those who can get public transport to do so, as well as reducing cost-of-living pressures for existing train and bus commuters.

Recommendation 6

The NSW Government should allocated $63 million to expand the eligibility of the concession opal card to include shift workers, especially those in essential public services such as healthcare.

Priority 4: Addressing payment delays and cashflow uncertainty

Small businesses employ 1.6 million people in NSW, which equates to 41 per cent of NSW's private sector workforce.[58] These workers come from a total of 785,886 small businesses in NSW.[59] The construction industry accounts for more smaller businesses than any other industry.[60]

Late payments drive cashflow uncertainty

The Australian Small Business and Family Enterprise Ombudsman (ASBFEO) cites that no business should have to wait any longer than 30 days to be paid, yet the average business invoice repayment is 45 days. Once again, small businesses are disproportionately further affected with an average wait time between 56 and 66 days.[61]

Ultimately this means that more than 57 per cent of SMEs are using credit cards just to offset late payments that they aren't receiving. This in turn leads to otherwise avoidable interest payments and further business uncertainty. [62]

What this means is reduced activity, less hirings, and less downstream flows of economic activity. One of the key drivers of this phenomenon is the observed lag in payment times to small businesses, which sets them at the mercy of loans and uncertainty. Reducing this time lag should be an imperative for Federal and State governments, and would equate to the same effect as stimulus payments observed over 2020.

Small businesses are nimble, but are also victims of economic uncertainty

Among small businesses started in 2016, less than 70 per cent have survived. This is disproportionate relative to larger businesses, which experience much greater survival rates at over 85 per cent.[63]

Employment Size	Businesses June 2014	Survived to June 2018	Survival rate %
Non-employing	1,273,769	758,922	59.6
1–4 Employees	571,206	395,953	69.3
5–19 Employees	199,965	155,270	77.6
20–199 Employees	51,619	42,408	82.2
200+ Employees	3,603	3,084	85.6
Total employing	826,393	596,715	72.2
Total	2,100,162	1,355,637	64.5 Average

Source: ABS Counts of Australian Business 8165.0, Table 15. Feb 2019 and ASBFEO calculations.

Table 2: Small business survival rates by size over 4-years from 2016

The construction industry counts more small businesses than any other. Small businesses in construction are the single highest contributor to economic growth, with an estimated value-add of over $72 billion[64].

This reveals the importance of small businesses in construction and trades to the Australian economy and highlights how policy must be developed now more than ever to support those that suffered throughout the pandemic.

Unpredictable cashflow is the single greatest issue faced by small businesses

Poor cash flow accounts for 1 of every 2 business failures[65] in Australia. But this issue is significantly more pronounced for small businesses, for whom cash flow problems make up 90% of all failures[66].

Cash is the lifeblood of all businesses. For small businesses, a delay in receiving payments can make the difference between shutting down and staying open. This is particularly relevant coming out of the year of lockdowns and business uncertainty, in which potential clients are putting off work that they might otherwise pay for.

Late payments are equivalent to $52,000 missing from every small business' bank account

Australian small businesses issued $216 billion worth of invoices in 2019.[67] With 53% of these invoices arriving late, this amounts to $115 billion in cash that is not going to use for these small businesses.[68] Inevitably this means a significant amount of activity such as paying off bills, purchasing supplies, hiring labour, bringing on new clients or more must be put off until funds are available.

For context $115 billion represents $52,000 to each and every small business in Australia, "the equivalent of new Toyota Hilux" (ASMFEO), or 1/3rd of average yearly revenue that they are not able to spend.

Previous Federal Government attempts at reforming late payments have been insufficient

The government has introduced multiple schemes to improve the time in which small businesses are being paid. Under the Payment Times Reporting Act, select public entities have been reporting and publishing their payment times from 2014. This was amended to include all public entities from 2020 and has been further expanded to include private entities with a turnover greater than $100 million per annum. Financial penalties have also been introduced to discourage misreporting or non-reporting[69].

The Federal Government defines "long payment" as any payment that exceeds a 30-day delay. This is the boundary at which downstream delays arise and unnecessary costs are incurred, due to businesses' needs to pay bills and other payments that fall under similar timeframes.

Supposedly, this should encourage small businesses to take on jobs from employers that they believe will pay them promptly. In theory this means that there should be an incentive to larger organisations to pay small businesses they commission on time in order to draw in more potential suppliers. Further, the social pressure should incentivise large organisations to not want to have to report late payment times. However, there is no policy that enforces or incentivises early or prompt payment to small businesses, and the foundation of current policies relies on small businesses selecting contracts based on published data.

The efficacy of existing Government schemes to reduce late payments is unclear

Examining the data made available by public entities payment times, a greater proportion of payments are being made within the 20-day timeline. Despite insignificant changes between 2017 and 2019, the rate of early payments more than doubled in the financial year ending 2020.

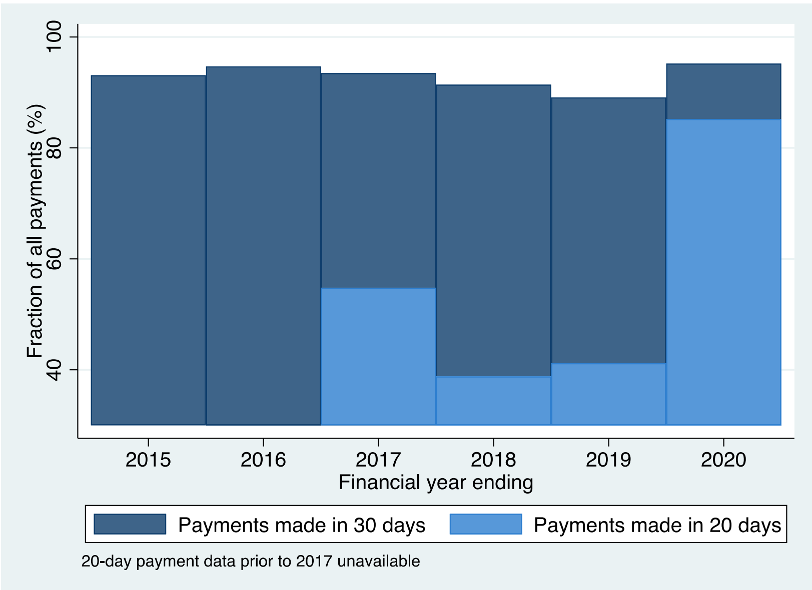

Figure 6: Average payment times from reporting government entities

However historical data suggests that the Payment Times Reporting Act may not have it's intended effect. Select public entities have reported their payment times from 2014, and actually experienced an increased dollar value of late payments to small businesses. The proportion of payments made late actually increased by 3% from 2016 to 2019 (Figure 11).

The proportion of late payments (those exceeding 30 days) has remained virtually unchanged when comparing 2020 to the 2015-2016 average.

Prompt payments made within the 20 day timeframe may have increased in 2020 due to increased overall transfer payments being made by the public sector. As such, the year is unlikely to be representative year of the trend of payments being made on time, and so the increase should not be taken as a sign of a turnaround.

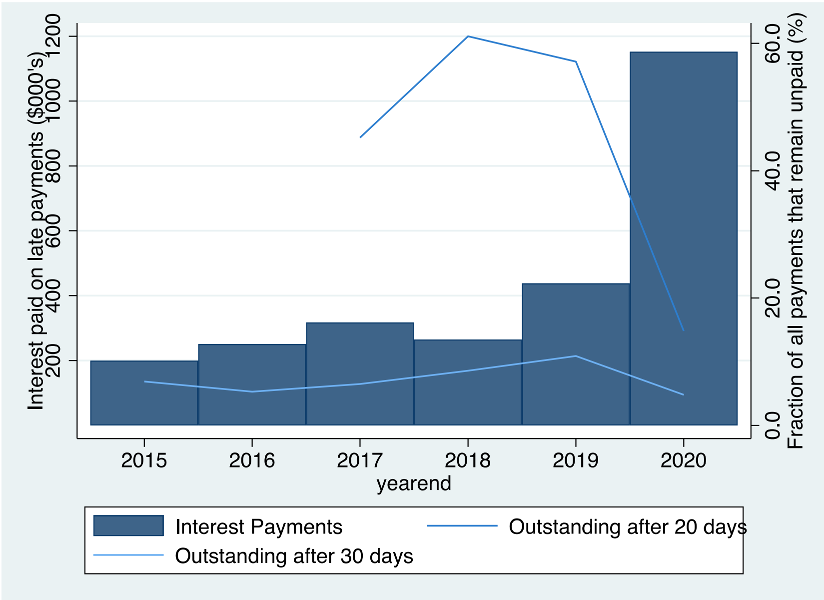

Figure 7: Interest payments from government entities

Further investigation highlights the same core issues experienced by small businesses. Figure 8 reveals that the percentage of outstanding payments after 30 days has remained virtually unchanged and high, at approximately 10 per cent (dollar value) of all payments made in that year.

Ultimately this also comes at a cost to Government budgets. In 2020 a total of $1.2 million was paid as interest payments from Government entities. This represents a 250 per cent increase on 2019.

Private payments to small businesses paint an even worse image

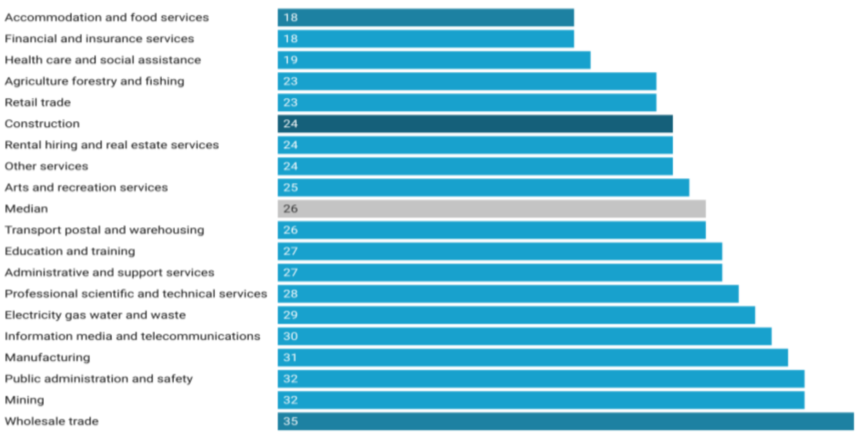

Figure 8: Late payments to small businesses for all Xero businesses

Comparable countries have implemented numerous late payment schemes

The OECD Centre for Entrepreneurship, SME's, Regions and Cities provides policy recommendations and reviews OECD top policy performers. In collaboration with the G20, a policy brief was release suggesting effective approaches and strategies to foster a competitive and successful SME landscape[70]. Of the five policy recommendations, Australia has only implemented the first as of January 2020.

Policy	Implementation
Tracking delays in payments by public bodies, consolidating related data, and potentially also publishing it (online) or sharing it with the Parliament.	✓
Putting in place mechanisms enabling SMEs to report late payments by public bodies	✗
Establishing an Observatory of payment delays to examine the conditions of payments between enterprises.	✗
Creating a Mediator or Commissioner competent on all questions related to payment delays, whether the client is public or private.	~
Setting up project bank accounts to ensure public bodies prompt payments to suppliers working on a project.	✗

Table 3: Australia's Performance vs OECD Recommended SME Prompt Payment Policies

Recommendation 7

The NSW Government should legislate a SME Payment Support Package including: a Prompt Payment Code and a new platform for SME's to report late payments on a publicly available register.

Recommendation 8

The NSW Government should legislate project bank accounts to ensure payments to small businesses are made available when needed. These accounts should be opened prior to the commencement of work.

Priority 5: Reducing barriers for apprentices

From 1 January 2019, the Federal Government announced a wage subsidy scheme for apprentices, only available to employers in regional and rural communities. It subsidised 75 per year of the employee's wage in the first year, with this decreasing to 50 per cent in the following year and 25 per cent in the third year.

This was expanded from 1 January to 30 September 2020 to include all small businesses, and the wage subsidy was decreased to 50 per cent of the apprentice's wage. From 1 July 2020, this was expanded to medium businesses. In October 2020, it was expanded again until September 2021. In March 2021, it was announced that the scheme would be further extended until September 2022.

While the wage subsidy has been effective at increasing the number of apprentices, the continual extensions does not provide certainty to the sector and for apprentices, with the Government repeatedly seeking short-term 'sugar-rushes' that flow from the announcement.

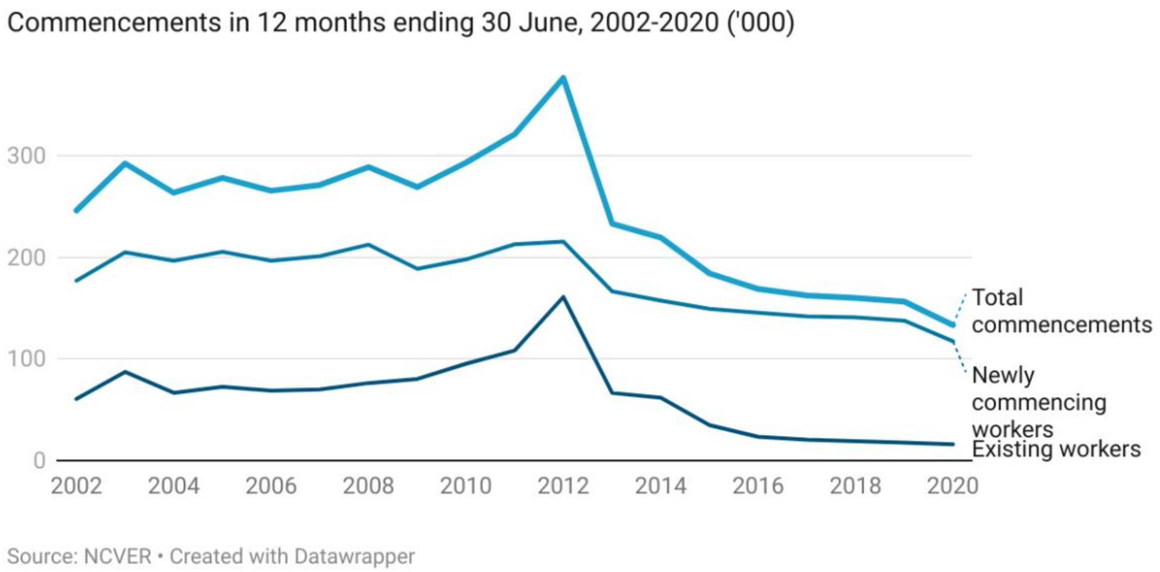

Figure 9: Historial Time Series Data of Apprentices and Traineeships in Australia

A report by Business NSW found that COVID-19 had a negative impact on apprenticeship commencements. It found a 30-40 per cent drop in commencements immediately following the onset of the pandemic, and that April-May experienced a large number of suspensions or cancellations.[71] While it was supportive of the Government measures, such as the wage subsidies and JobKeeper, it recommended that these measures be expanded and continued to ensure no further decline.[72]

Therefore, the Government should commit to a five-year funding commitment for the wage subsidy, together with funding commitments for the training program known as JobTrainer. This would allow certainty in the sector, and for small and medium businesses. This 5-year period could conclude with an examination of apprentice numbers with respect to long term trends, to then determine if it should be continued.

Recommendation 9

The Federal Government should negotiate a five-year, long term partnership agreement with the states and territories for the funding of vocational education to match the pre-2011 level of funding per capita.

Job Trainer may not provide a return to previous vocational education funding levels

On 16 July 2020, the Federal Government announced that it will "invest" $1 billion to give Australians access to new skills.[73] The JobTrainer program will provide an additional 340,700 training places to help school leavers and job seekers access short and long courses to develop new skills in growth sectors and create a pathway to more qualifications.

States and territories need to sign up to a new Heads of Agreement to access JobTrainer funding, with the agreement setting out immediate reforms to improve the vocational education and training sector, and providing the foundation for long term improvements as outlined by the Prime Minister in his recent speech to the National Press Club.

However, even with an extra $1 billion in funding, total government support for vocational education is still likely to be lower than its 2012 peak.[74]

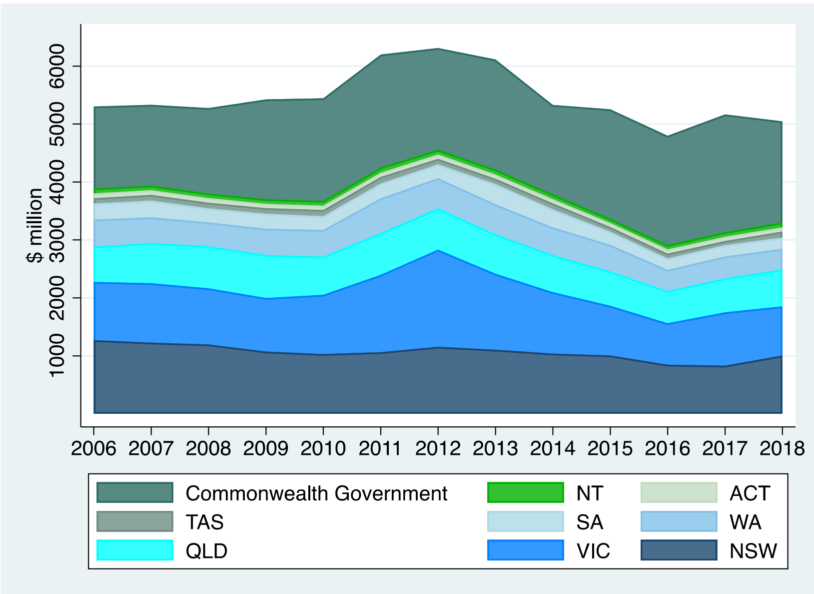

Figure 10: Combined government funding is down on the long-term average, and below the 2011-12 peak. Source: Mitchell Institute

Moreover, this combined level of funding when considered *per capita* represents a long-term decline in the funding of vocational education. Even with the wage subsidy programs, a funding boost is needed to bring it in like with either the 20112 peak, or even the pre 2012 average levels of funding.

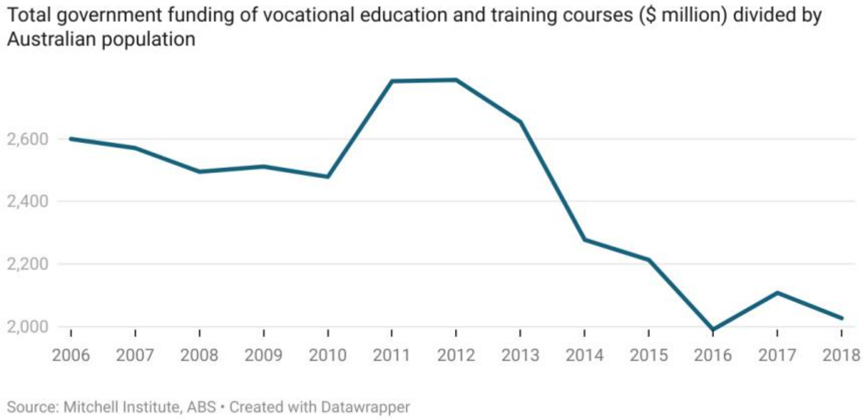

Figure 11: Government funding per capita is down over the last decade

The adequate funding of TAFE NSW needs to be a core feature of new funding arrangements for vocational education and training. As the largest provider of VET courses in NSW, TAFE needs to be adequately resourced in order to strengthen the take-up rate of apprentices. In the McKell Institute's previous research we have outlined how the funding and administration of TAFE is facing serious challenges.[75] Private providers are on the rise and a decade of declining funding mean that TAFE staff and teachers are feeling 'demoralised' due to increases in class sizes as well as class and campus closures.[76]

However, the COVID-19 pandemic provides an opportunity for growth with Federal and State Government support. A new partnership agreement, which specifically provides for guaranteed funding for TAFE NSW may allow for this growth. This should include fully funding courses in skill shortage areas, to provide free tafe in the areas our economy needs most.

Recommendation 10

The NSW Government should allocate $11 million per year to make TAFE free for courses in professions with a skills shortage for the five-year period of the partnership agreement in recommendation 9.

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