

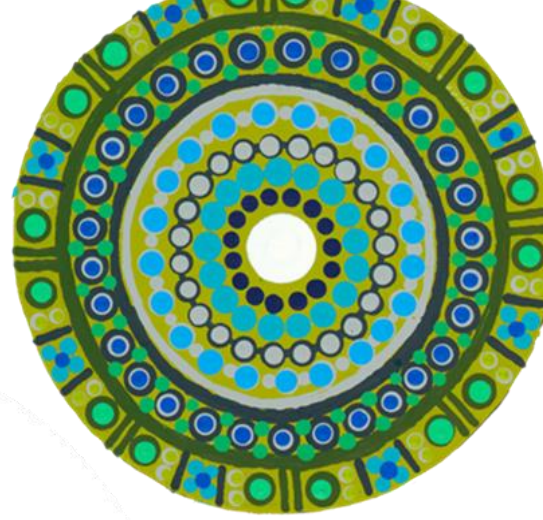
Federation of
Victorian Traditional
Owner Corporations

Federation of Victorian Traditional Owner Corporations

Project 2 - Methodology report for sector analysis

March 2024

Deloitte.



Acknowledgement

The importance of cultural responsibility and sensitivity is reflected in our planning and delivery of this project. Our work is underpinned by the principle of supporting and remaining true to the culture, beliefs and worldviews of different communities.

With reverent hearts, we therefore humbly acknowledge the timeless custodianship of the First Nations peoples, who have graced this vast and wondrous land for over 80,000 years. Their unwavering connection to the earth, its glistening waterways, and the sky above is a testament to their profound wisdom and enduring grace.

We pay homage to their respected Elders, the keepers of their sacred knowledge, and to all the generations who have tended to this unceded land with steadfast care. We honour and pay our sincerest respects to all the Traditional Owners who have enriched this ancient and sacred place with their boundless spirit and resilience.

Terminology

This document primarily uses the designation “Aboriginal” to refer to Aboriginal and Torres Strait Islander Australians. Within the context of this document, we may also use interchangeably the designations “First Nations”, “Aboriginal and Torres Strait Islander” and “Indigenous” to discuss these peoples. We acknowledge and pay respect to the Aboriginal and Torres Strait Islander community of Victoria and all First Nations peoples who have participated in the process of this work.

Connections to Country

As First Nations practitioners our responsibility to culture and lore is reflected through the artwork excerpts throughout this document. The original artwork titled Pathways to Country was created for Deloitte Indigenous Services Group by Bundjulong and Gomerroi/ Euahlayi Artist Lee-Anne Hall.



Purpose and methodology of this report

Context: The Federation of Victorian Traditional Owner Corporations (FVTOC, the Federation) are commissioning five research projects with the overarching goal of increasing Aboriginal economic development and self-determination within the Victorian Aboriginal business sector. Deloitte have been commissioned to undertake Projects 1 and 2, which are intended to provide Victorian Traditional Owner Corporations (TOCs) and other stakeholders with the data and information necessary to guide strategic investment in Aboriginal economic development.



The **purpose** of Project 2 was to identify and profile selected industry sectors and markets in Victoria that offer strong economic growth opportunities for TOCs and Victorian Aboriginal businesses. Four key steps were taken as part of the **methodology** of Project 2.

Step	1. Development of long list of sectors	2. Development of multi-criteria framework for assessing sectors	3. Assessment of long list against multi-criteria framework to identify top 10 sectors	4. Development of sector profiles for top 10 sectors
Actions	<ul style="list-style-type: none"> Rapid desktop review of ABS industry classifications, mapped against FVTOC resources, Victorian TOC Country Plans, and Victorian policy and funding 	<ul style="list-style-type: none"> Co-design with the Federation and stakeholders 	<ul style="list-style-type: none"> Use of quantitative and qualitative data Scoring system out of 10 	<ul style="list-style-type: none"> Wider analysis of Victorian industries Summary reports of the findings identified by the multicriteria analysis
Result	17 sectors, defined using terminology relevant to TOCs, including Caring for Country, Cultural Education, and Health Care and Social Assistance	6 criteria for assessment: economic prospects, cultural significance, existing capability, social return, alignment with policy, alignment with treaty	Final weighted score per sector based on multicriteria framework, identification of top 10 sectors based on highest scores	10 individual sector reports detailing sector overview, results of multicriteria analysis and commercial considerations

This report presents the methodology for Project 2, structured according to the steps above. The sector profiles are available as individual sector reports.

Developing the long list of sectors

The final long list of 17 Victorian sectors that present opportunity for growth and are suitable for Aboriginal participation are shown on the right.

To develop this long list, Deloitte considered the following resources in a rapid desktop review:

1. Target industries mentioned within the Country Plans for Victorian TOCs that are available online
2. FVTOC resources provided to Deloitte
 - a. Summary of FVTOC Aboriginal Economic Brokerage work
 - b. Victorian Policy Overview – First Peoples and Clean Energy
 - c. Dja Dja Wurrung Renewable Energy Strategy
 - d. Gunaikurnai and Offshore Energy
3. A rapid desktop overview of ABS / IBISWorld data sets, and;
4. Victorian policy and funding (existing and announced).

This list underwent a number of reviews by both internal and external stakeholders with Traditional Owner Corporations, Universities, economic researchers, the Kinaway Chamber of Commerce and the Koorie Caucus.

Through these discussions this list was refined further, and checks were done to make sure all key Victorian industries were included. These industries were then renamed to better highlight Aboriginal involvement within each sector. These new names will be referred to as ‘sectors’ throughout the rest of this document, to differentiate between industry names used in key datasets such as the Australian Bureau of Statistics (ABS) Census.

Notably the ‘Water’ and ‘Commercial Land use’ industries were considered holistically within the multicriteria analysis against each of these sectors, rather than being individual sectors. This is due to the way in which they intersect with many of these sectors and do not offer uniquely defined business offerings for Aboriginal people; however there are important considerations that are covered in the criteria.



No.	Sectors in the long list
1	Aquaculture
2	Mining
3	Native Medicine and Food Systems
4	Clean Energy
5	Waste Management
6	Construction
7	Fashion
8	First Nations Tourism
9	Arts and Performance
10	Media and Communications
11	Finance and Insurance
12	Indigenous Consulting
13	Caring for Country
14	Public Administration
15	Cultural Education
16	School Education
17	Health and Social Services

Business opportunities for long list of sectors

Below is the final long list of 17 Victorian sectors with identified business opportunities/occupations for Aboriginal businesses/employment.

No.	Sector	Business opportunities / occupations
1	Aquaculture	Offshore, coastal and inland facilities for seaweed, oyster, trout, abalone, blue mussel, aquarium finfish, Murray cod, barramundi and yabby etc.
2	Mining	Sand and Gold mining, land management, post mining restoration, cultural advisory
3	Native Medicine and Food Systems	Seeds, growing, wholesaling, manufacturing, packaging, retail, tourism, education, science, botanicals, Seeds, growing, wholesaling, manufacturing, packaging, marketing, retail, tourism, education
4	Clean Energy	Micro-grids, hydro, off-shore wind, wind turbines / farming and carbon credit schemes
5	Waste Management	Land protection and restoration, circular economies / recycling and treatment
6	Construction	Residential and commercial construction, land management and protection
7	Fashion	Design, production, retail, wholesaling, packaging, marketing, education
8	First Nations Tourism	Marketing, education, touring, accommodation, transport, land management
9	Arts and Performance	Dance, theatre, singing, mixed media art

No.	Sector	Business opportunities
10	Media and Communications	Authoring and illustrating literature, TV and film production, podcasting, publishing, magazines and newspapers, journalism, marketing, education
11	Finance and Insurance	Superannuation, loans, insurance, investments and trade
12	Indigenous Consulting	Architecture, engineering, structural design, scientific testing and analysis, legal, advertising, consulting
13	Caring for Country	Scientific testing and analysis, pest control, cultural advisory, conservation, nature reserves, zoological and botanical gardens operation, museums and historical preservation, bio-security
14	Public Administration	State/Local Government administration, justice, domestic government Representation, defence, fire protection and other emergency services, public safety services, correctional and detention services, cultural advisory
15	Cultural Education	Technical and vocational education and training specialising in cultural competency, tours and on Country education, culturally significant trades, cultural safety training
16	School Education	School education programs, textbooks and resources, educational programs / seminars
17	Health and Social Services	General practitioners, disability and aged care services, mental health and other specialist services, equipment manufacturing and retail, online tools

Industry mapping for long list of sectors (1/2)

For each of the sectors, relevant industries and sub-industries were mapped from the Australian and New Zealand Standard Industrial Classification (ANZSIC). This mapping (shown below) was undertaken at the start of the analysis to assist in developing the long list and then used in the economic analysis as part of the multi-criteria analysis. In some cases, sectors do not neatly map to industries in one or both data sources. In these cases, the most appropriate mapping was made and other research was considered in the sector profiles for top performing sectors.

It was also useful to use IBISWorld reports for the economic growth analysis in the multi-criteria analysis, given the granularity of sub-industries provided in these reports. The mapping to IBIS World industries is also shown below. Economic growth analysis utilised Deloitte data based on ANZSIC industries as well as IBISWorld data while assessment of existing capability utilised ABS Census data based on ANZSIC industries.

No.	Sector	ANZSIC classification (Level 1 Industry Level)	IBIS World classification/s
1	Aquaculture	<ul style="list-style-type: none"> Agriculture, Forestry, and fishing 	<ul style="list-style-type: none"> Aquaculture Fishing
2	Mining	<ul style="list-style-type: none"> Mining 	<ul style="list-style-type: none"> Gold Ore Mining Mineral Sand Mining Management Consulting
3	Native Medicine and Food Systems	<ul style="list-style-type: none"> Agriculture, Forestry & Fishing Food, Beverage and Tobacco Accommodation and Food Services Wholesale Trade Retail Trade 	<ul style="list-style-type: none"> Alternative Health Therapies
4	Clean Energy	<ul style="list-style-type: none"> Electricity, Gas, Water and Waste Services 	<ul style="list-style-type: none"> Wind and Other Electricity Generation Solar Electricity Generation
5	Waste management	<ul style="list-style-type: none"> Electricity, Gas, Water and Waste Services 	<ul style="list-style-type: none"> Sewerage and Drainage Services Solid Waste Collection Services Liquid Waste Collection Services Waste Treatment and Disposal Services Waste Remediation and Materials Recovery Services
6	Construction	<ul style="list-style-type: none"> Construction 	<ul style="list-style-type: none"> Construction
7	Fashion	<ul style="list-style-type: none"> Textile, Leather, Clothing and Footwear Wholesale Trade Retail Trade Professional, Scientific and Technical Services 	<ul style="list-style-type: none"> Cut and Sewn Textile Product Manufacturing Knitted Product Manufacturing Male Wear Manufacturing Female Wear Manufacturing Footwear Manufacturing Clothing Wholesaling Footwear Wholesaling Clothing Retailing Footwear Retailing Packaging Services Specialised Design Services
8	First Nations Tourism	<ul style="list-style-type: none"> Tourism (ATIC forecast) 	<ul style="list-style-type: none"> Specialised Design Services Art and Non-Vocational Education Travel Agency and Tour Arrangement Services Tourism Hotels and Resorts Motels Serviced Apartments Caravan Parks, Holiday Houses and Other Accommodation
9	Arts and Performance	<ul style="list-style-type: none"> Arts and Recreation Services 	<ul style="list-style-type: none"> Music and Theatre Production

Industry mapping for long list of sectors (2/2)

No.	Sector	ANZSIC classification (Level 1 Industry Level)		IBIS World classification/s	
10	Media and Communications	<ul style="list-style-type: none"> Information Media and Telecommunications 	<ul style="list-style-type: none"> Printing and Recorded Media 	<ul style="list-style-type: none"> Newspaper Publishing Free-to-Air Television Broadcasting Magazine and Directory Publishing Internet Publishing and Broadcasting Radio Broadcasting 	<ul style="list-style-type: none"> Book Publishing Motion Picture and Video Production Motion Picture and Video Distribution Cinemas Video post-Production Services Music Publishing and Sound Recording
11	Finance and Insurance	<ul style="list-style-type: none"> Financial and Insurance Services 		<ul style="list-style-type: none"> Financial Planning and Investment Advice 	<ul style="list-style-type: none"> Superannuation Funds Management Services
12	Indigenous Consulting	<ul style="list-style-type: none"> Professional, Scientific and Technical Services 		<ul style="list-style-type: none"> Scientific Research Services Architectural Services Engineering Consulting Specialised Design Services Management Consulting 	<ul style="list-style-type: none"> Environmental Science Services Legal Services Advertising Agencies Market Research and Statistical Services
13	Caring for Country	<ul style="list-style-type: none"> Administrative and Support Services (this alignment was pursued given the ANZSIC Level 2 industries that fall under this industry - Building Cleaning, Pest Control and Other Support Services, Arts and Recreation Services, Professional, Scientific and Technical Services [Except Computer System Design and Related Services]) 		<ul style="list-style-type: none"> Building Pest Control Services Nature Reserves and Conservation Parks 	<ul style="list-style-type: none"> Zoological and Botanical Gardens Art Galleries and Museums Landscaping Services
14	Public Administration	<ul style="list-style-type: none"> Public Administration and Safety 		<ul style="list-style-type: none"> State Government Administration Police and Firefighting Services 	<ul style="list-style-type: none"> Local Government Administration Correctional and Detention Services
15	Cultural Education	<ul style="list-style-type: none"> Education and Training 		<ul style="list-style-type: none"> Technical and Vocational Education and Training 	<ul style="list-style-type: none"> Art and Non-Vocational Education and Training
16	School education	<ul style="list-style-type: none"> Education and Training 		<ul style="list-style-type: none"> Preschool Education Government Schools 	<ul style="list-style-type: none"> Technical and Vocational Education and Training University and Other Higher Education
17	Health and social services	<ul style="list-style-type: none"> Health Care and Social Assistance 		<ul style="list-style-type: none"> Health Services General Practice Medical Services Specialist Medical Services Other Health Services 	<ul style="list-style-type: none"> Aged Care Residential Services Crisis and Care Accommodation Community Services Child Care Services Personal Welfare Service

Multi-criteria framework

Overview

A set of six criteria were designed to assess the growth opportunities of Aboriginal businesses in different sectors. The criteria provide a balance of both cultural considerations and economic performance drivers as the Aboriginal businesses will have competitive advantage and growth prospects in industries that are supported by funding, that are unique to their set of skills, that will be supported by upcoming Treaty negotiations and that will improve the standard of living for communities and are therefore in governments' best interest to support via policy. High performance in all criteria reflect sectors with the prime economic environments for new business opportunities.

In order to recommend a shortlist of 10 high growth sectors for Aboriginal businesses in Victoria, each sector on the initial long list underwent an assessment against each of the six criteria with reference to key commercial considerations. Using these insights, each sector received a rating against each criteria and its score was used to determine its ranking in the final list.

Criteria

Six criteria were considered during the multi-criteria analysis, including:

-  **Economic prospects** – the extent to which the sector or market was expected to grow in terms of revenue and/or employment
-  **Cultural significance** – the extent to which the sector/market aligned with / enhances Traditional Owner cultural values
-  **Existing Capability** – the extent to which Aboriginal Victorians had a proven track record within the sector/market
-  **Social Return on Investment** – the extent to which the sector/ market contributed to social, cultural and environmental outcomes for Aboriginal Victorians.
-  **Alignment with policy** – the extent to which the sector had advantageous social procurement policies that would enhance the opportunity.
-  **Alignment with Treaty** – the extent to which the opportunity could be enhanced by Treaty. Notably reliance on natural bodies of water and land use were considered as part of this criteria.

Key commercial considerations

Additionally, there were key factors of consideration that were explored within the analysis, but did not affect a sectors' overall rating, including:

- o **Aboriginal Cultural and Intellectual Property** – the extent to which an opportunity could support the rights of Aboriginal people to have and protect their culture, knowledge lore and arts
- o **Range of opportunities** – it was preferable that there were a mix of mainstream and unconventional opportunities present on the long list to stimulate emerging and high growth markets
- o **Practicality of data** – the extent to which the data was accessible
- o **Repeatability of the analysis** – the extent to which the datasets and processes used could be repeated in future iterations of the research

How the assessment was undertaken

Each sector was allocated a score per criteria, as well as a rating in the Red, Amber, Green (RAG) rating system to showcase whether a sector performs 'high, medium, or low' against each criteria.

The numerical scores were assigned as follows:

- Criteria 1 and Criteria 3 were informed by data, which was normalised such that each sector received a rating between 0 – 10
- The remaining criteria were informed by qualitative research, which was used to assign each sector a rating between 0 – 10
- The 0 – 10 ratings aligned to the RAG rating system.

Each sector was given an overall score based on the individual criteria scores, using a weighting average.

Rating	Meaning
High	High alignment to criteria
Medium	Medium alignment to criteria
Low	Low alignment to criteria

Criteria 1: Economic prospects

The extent to which the sector or market is expected to grow in terms of revenue and/or employment

Methodology summary: Sectors were mapped to industries from two sources: Deloitte Access Economics Macroeconomic forecasts for Victoria (aligned to ABS ANZSIC industry codes), and IBISWorld industry reports for Australia. The sources include 5-year growth rates for Gross Value Added (Deloitte forecasts) or revenue (IBISWorld). An average of both sources was used where both were considered to be suitable reference points for the sector; otherwise one source was used. The final growth rates per sector were then ranked and normalised on a scale from 0 to 10, with 10 reflecting very strong economic prospects.

The scoring methodology for Criteria 1 had three key steps.

1. Data collection

Deloitte Access Economics Macroeconomic Forecasts for Victoria:

- For relevant industries, a compound annual growth rate (CAGR) was calculated for forecasted Gross Value Added (GVA) from 2024 and 2028.
- GVA: Dollar value for the amount of goods and services that have been produced in an industry, minus the cost of all inputs and raw materials that are directly attributable to that production.*

An exception was First Nations Tourism, as tourism (like other sectors) does not neatly fit into the ANZSIC categories. Instead, forecasts for visitor demand to Victoria from the Australian Tourism Industry Council were used, which reflect economic prospects for the sector.

IBISWorld Industry Reports for Australia:

- CAGRs of industry revenue were sourced for relevant IBISWorld industries, for a five-year period of either 2024-29 or 2023-28 (depending on availability).

Example: *Clean Energy*

- Deloitte Access Economics GVA growth rate for *Electricity, Gas, Water and Waste Services*: 0.87% CAGR (2024-28)
- IBISWorld revenue growth rate:
 - Wind and Other Electricity Generation*: 0.6%
 - Solar Electricity Generation*: 3.6%
 - Average*: 2.1%
- Final growth rate: The IBIS World growth rate of 2.1% was selected rather than an average of the two sources, as the ANZSIC industry mapping is less relevant for the Clean Energy sector than the two IBISWorld industries.

2. Data consolidation and validation

- If a sector had multiple industries mapped to it in the Deloitte Access Economics forecasts, an average growth rate was calculated. Likewise for the IBISWorld data.
- The final growth rate for the sector was then determined as follows:
 - A simple average of the growth rates across both sources, or
 - Where this average was skewed or did not reflect the research found on potential growth of the given sector, the indicator was changed to only reflect one of the two data sources.

3. Sector Rating

- The final growth rate or score for the sector was used to allocate sectors a score from 1-10, by normalising the data using min-max scaling.
- A Red-Amber-Green (RAG) rating was also allocated to each sector based on the table below.
- A key implication of the normalisation process is that the scores between 0 and 10 are determined for each sector relative to the other sectors in the long list.

Low	Score = 1 - 3
Medium	Score = 4 - 6
High	Score = 7 - 10

Criteria 1: Economic prospects

The extent to which the sector or market is expected to grow in terms of revenue and/or employment

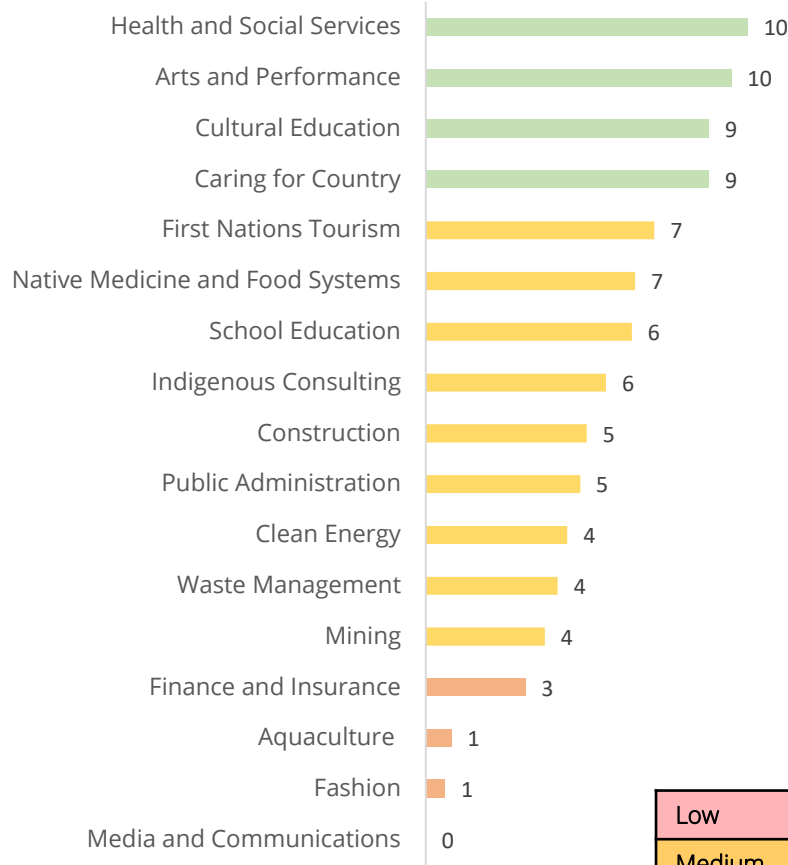
The table and chart below respectively display the growth rates calculated for each sector, and the associated scores by sector, which were used in the multi-criteria analysis. The analysis suggests that 1) Health and Social Services and 2) Arts and Performance are the highest performing industries while 1) Media and Communications and 2) Fashion are the lowest performing.

Estimated sector five-year growth rates by sector

Sector	Five-year growth rate
Health and Social Services	3.4
Arts and Performance	3.3
Caring for Country	3.1
Cultural Education	3.1
First Nations Tourism	2.7
Native Medicine and Food Systems	2.6
School Education	2.6
Indigenous Consulting	2.4
Construction	2.2
Public Administration	2.2
Clean Energy	2.1
Waste Management	2.0
Mining	1.9
Finance and Insurance	1.8
Aquaculture	1.3
Fashion	1.2
Media and Communications	1.1

Source: Deloitte scoring system, using Deloitte Access Economics forecasts and IBISWorld forecasts

Criteria 1 scores by sector (normalised scores based on growth rates)



Source: Deloitte scoring system

Low	Score = 1 - 3
Medium	Score = 4 - 6
High	Score = 7 - 10

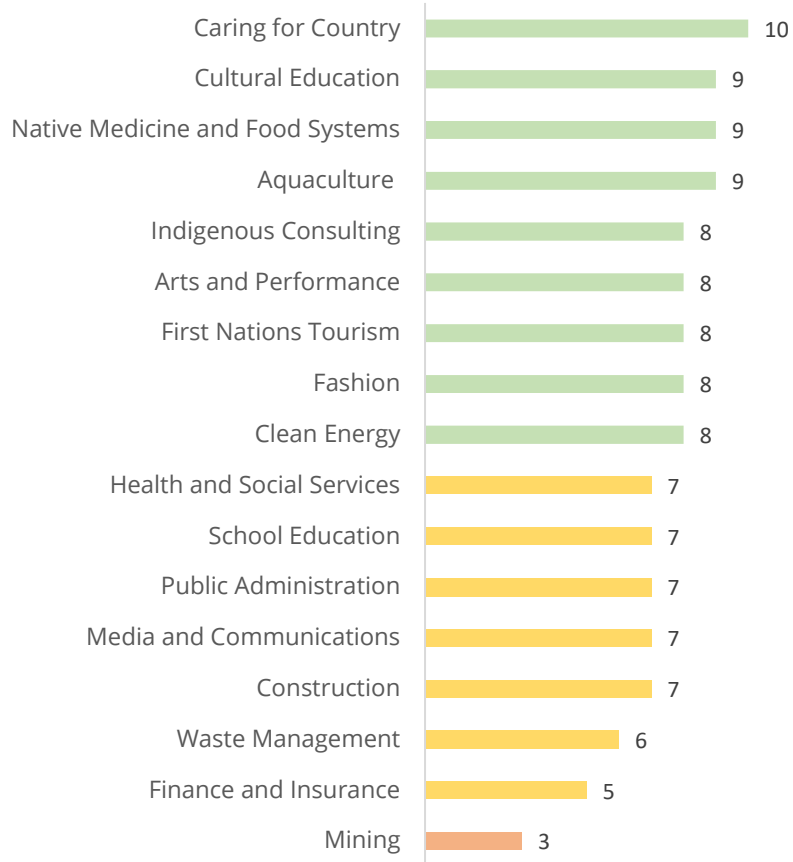
Criteria 2: Cultural significance

The extent to which the sector/market aligns with cultural practices and will afford an Aboriginal business competitive advantage.

Methodology summary: Rapid desktop research was conducted to identify each sector’s ability to exhibit compelling economic edge due to its alignment to profound cultural significance. Research outlined sectors within which Aboriginal businesses with traditional practices translated into a competitive advantage. These businesses have expertise which can lead to innovative approaches, cost-effective methods, and a deep-rooted connection with their target audience.

	Cultural significance
Process	<p>Rapid desktop research was conducted to indicate trends within each sector. The research was based on sector reports, Country plans from TOCs across Victoria, literature about cultural significance / connection and market sentiments.</p> <p>Using these insights, questions were asked to determine an overall objective rating :</p> <ol style="list-style-type: none"> 1. <i>Is there alignment to traditional cultural practices / beliefs?</i> 2. <i>Does this provide competitive advantage when applied to the current Victorian business landscape?</i> <p>These results were tested during stakeholder consultation and internal discussions to validate their accuracy.</p>
Low	The sector has little to no alignment with traditional values, cultural practices and Lore and will therefore provide little competitive advantage
Medium	The sector has moderate alignment with traditional values, cultural practices and Lore and will therefore provide moderate competitive advantage
High	The sector has very strong alignment with traditional values, cultural practices and Lore and will therefore provide strong competitive advantage
Summary	<p>Aboriginal businesses exhibit a compelling economic edge when involved in industries that hold profound cultural significance. Aboriginal inherent understanding of traditional practices within these sectors translates into a competitive advantage as this often leads to innovative approaches, cost-effective methods, and a deep-rooted connection with their target audience.</p> <p>Moreover, their involvement in culturally significant industries fosters community pride and interest, attracting both local support and wider market appeal. This alignment not only bolsters economic growth within their communities but also creates a unique selling point, driving consumer loyalty and distinguishing their enterprises in the marketplace.</p> <p>Such economic benefits stem from a rich blend of heritage, expertise, and market resonance that position Aboriginal businesses for sustained success within their culturally significant industries.</p>

Criteria 2 scores by sector



Source: Deloitte scoring system

Criteria 3: Existing Capability

The extent to which Aboriginal Victorians have a proven track record within the sector/market.

Methodology summary: Sectors were mapped to an industry or industries from the ABS Census (aligned to ABS ANZSIC industry codes). 2021 ABS Census data on Aboriginal employment by industry was used to create two indicators of existing capability: concentration and distribution. The average of these two indicators was used to score each sector.

The scoring methodology for Criteria 3 had three key steps.

1. Data collection

ABS Census 2021 data:

- For relevant industries, total Aboriginal employment on a Full-Time Equivalent (FTE) basis for Victoria was sourced.

2. Data consolidation

- Data was used to create two indicators of capability:
 - Concentration:* Aboriginal Employment FTE within a sector as a proportion of total employment FTE within a sector
 - Distribution:* Aboriginal Employment FTE within a sector as a proportion of total Aboriginal Employment FTE
- The two indicators together provide a picture of two important elements of capability – the representation of Aboriginal Victorians within a sector, as well as the representation of a sector within Aboriginal employment
- The final score for the sector was calculated as the average of the two indicators.

Example: *Construction*

- ABS Census industry: Construction
- Concentration: 0.9% Aboriginal employment of all sector employees
- Distribution: average of 14.2% Aboriginal employment of all Aboriginal employees
- Final score: Final average of 7.6

3. Sector Rating

- The final score for the sector was used to allocate sectors a score from 1-10, by normalising the data using min-max scaling.
- A Red-Amber-Green (RAG) rating was also allocated to each sector based on the table below.
- A key implication of the normalisation process is that the scores between 0 and 10 are determined for each sector relative to the other sectors in the long list.

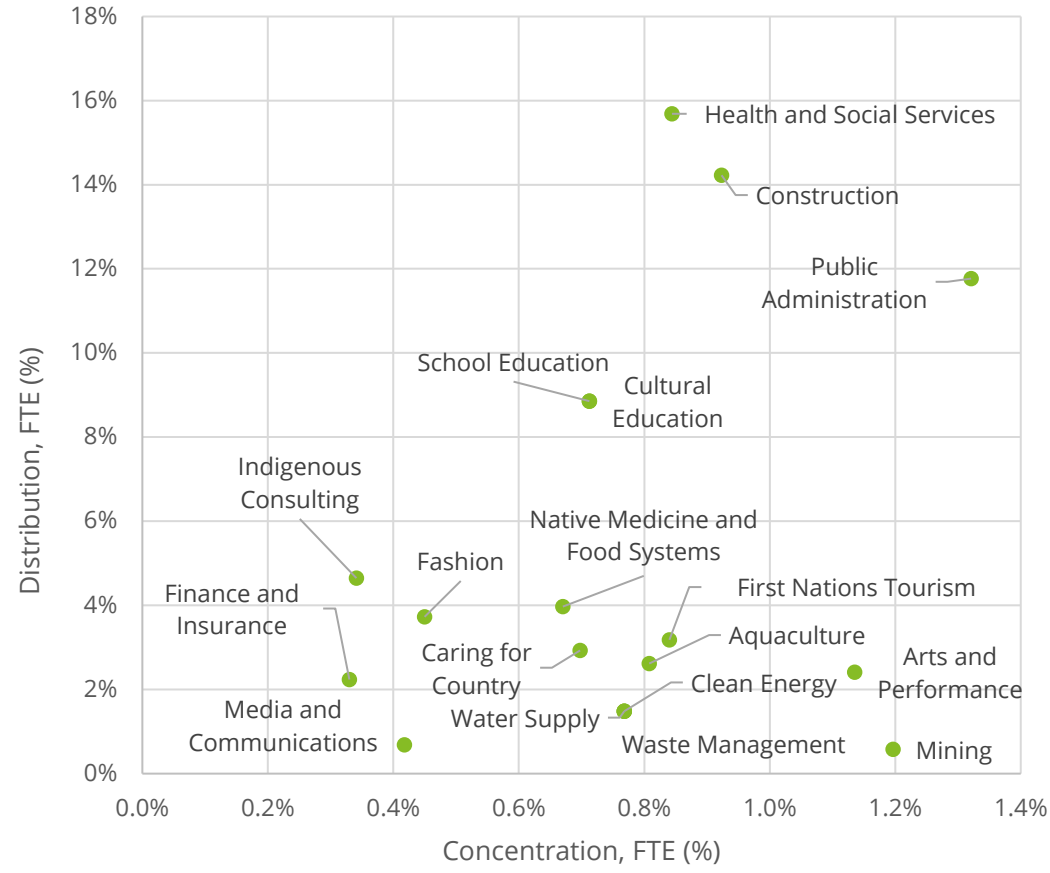
Low	Score = 1 - 3
Medium	Score = 4 - 6
High	Score = 7 - 10

Criteria 3: Existing Capability

The extent to which Aboriginal Victorians have a proven track record within the sector/market.

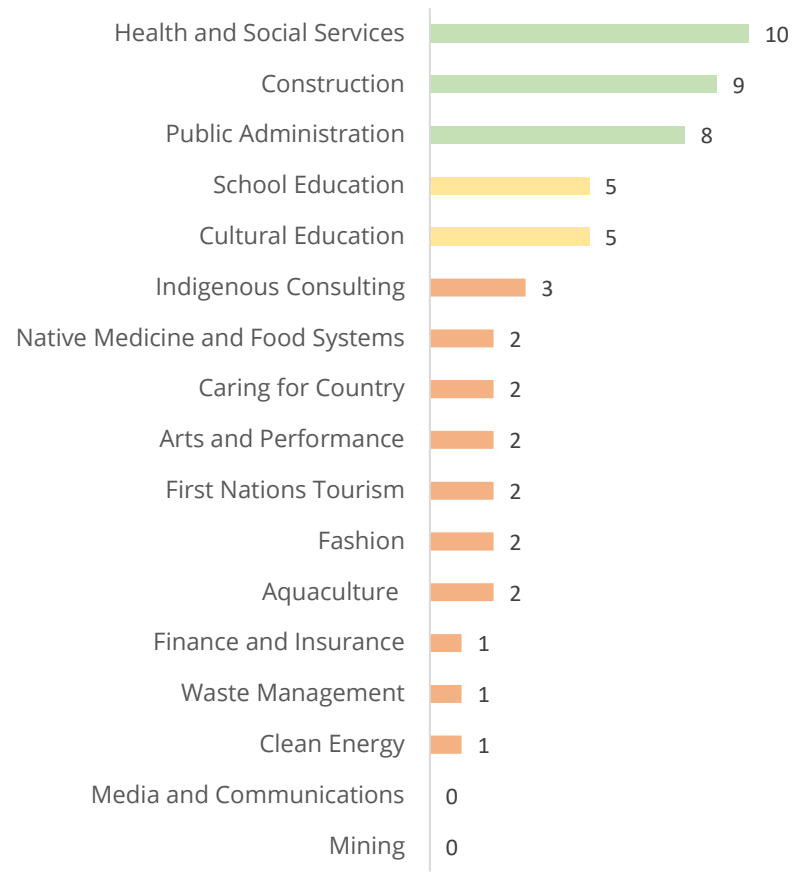
The table and chart below respectively display the concentration and distribution measures per sector, and the associated scores by sector, which were used in the multi-criteria analysis. The analysis suggests that 1) Health and Social Services and 2) Construction are the highest performing industries while 1) Media and Communications and 2) Land Ownership and Management are the lowest performing.

Aboriginal Employment FTE proportion



Source: ABS Census data, 2021

Criteria 3 scores by sector (normalised scores based on growth rates)



Source: Deloitte scoring system

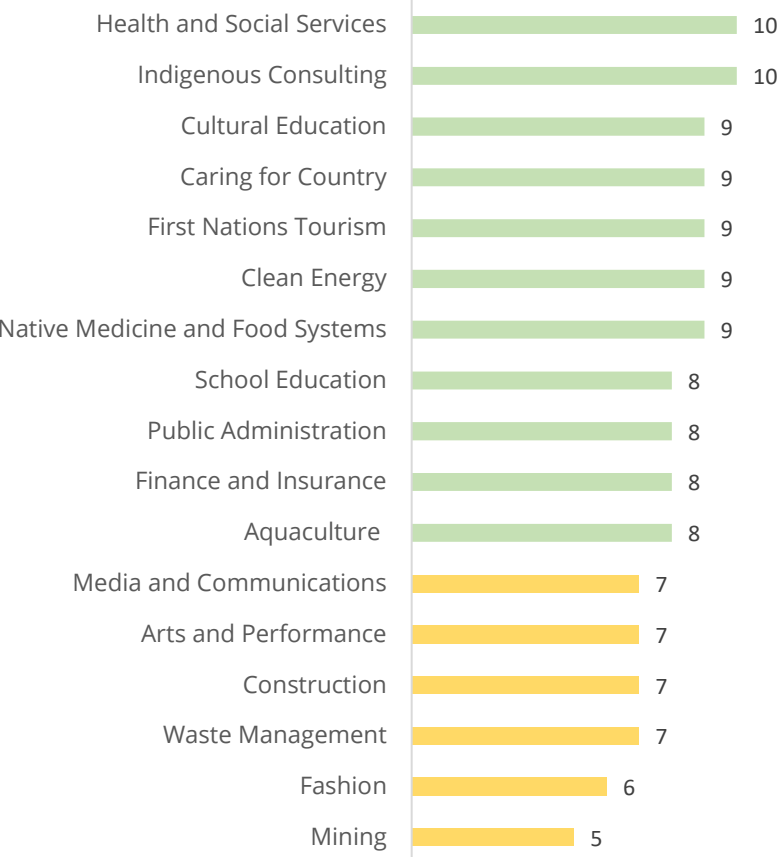
Criteria 4: Social return

The extent to which the sector/ market contributes to social, cultural and environmental outcomes for Aboriginal Victorians.

Methodology summary: This criteria measured the extent to which having more Aboriginal businesses and workers in a sector would deliver social returns. A key mechanism for this was whether the opportunity for greater Aboriginal self-determination, autonomy, choice and control in the sector would provide benefits to Aboriginal people / communities (for example through greater quality of life, safety, health, and access to basic human rights).

Social return on investment	
Process	<p>Rapid desktop research was conducted to indicate the likely social return of each sector. Case study examples were considered particularly in a Victorian context.</p> <p>During this process, both the direct and indirect social benefits were considered, whereby:</p> <ul style="list-style-type: none"> Direct benefits: Reliability of income, access to superannuation, amount of disposable income, basic needs met (e.g. the extent to which this sector provides reliable access to food, water, housing, security, electricity, sleep, clothing etc.), increased health outcomes (accessibility to general and specialist healthcare, lower rates of mental health challenges, proactive care), healthier environment to live in, greater access to education, greater cohesion/safety, greater employment rate <p>And;</p> <ul style="list-style-type: none"> Indirect benefits: Increased self-determination, autonomy, choice and control, contributing to the closing the gap targets, Increased work / life balance
Low	The growth of this sector created minimal improvement in the autonomy, self-determination, quality of life, health, safety, and access to basic human rights
Medium	The growth of this sector create moderated improvement in the autonomy, self-determination, quality of life, health, safety, and access to basic human rights
High	The growth of this sector created strong improvement in the autonomy, self-determination, quality of life, health, safety, and access to basic human rights
Summary	Investments in education, healthcare, and caring for Country were most likely to result in substantial social returns, due to the potential for greater self-determination in these sectors to improve social outcomes for Aboriginal communities.

Criteria 4 scores by sector



Source: Deloitte scoring system

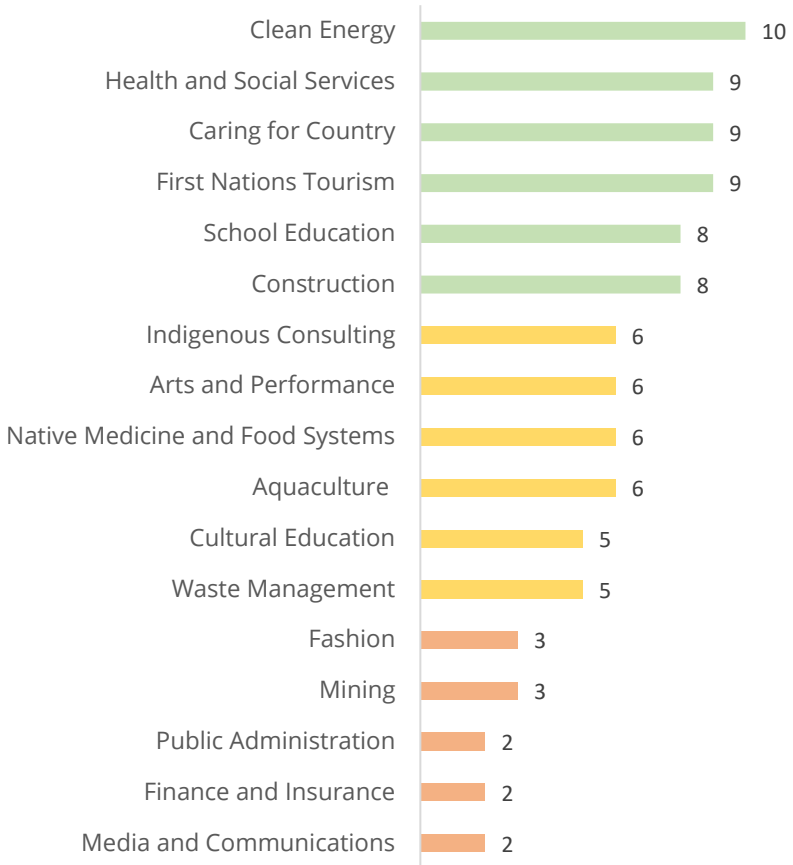
Criteria 5: Alignment with Policy

The extent to which the sector has advantageous social procurement policies that would enhance the opportunity.

Methodology summary: Rapid desktop research was conducted to assess each sector’s level of Government support for Aboriginal enterprises and employment in Victoria. These insights suggested the sectors which would be seeing growth via grants, policies, changing regulation and governance, and proposed and confirmed investments.

Alignment with policy	
Definitions	Based on rapid desktop research, the alignment to funding support available and announced or proposed policies across industries in Victoria; policy support encompasses government procurement policies, capacity-building initiatives, and grant funding policies.
Process	<p>To fully understand a sectors level of alignment to policy support initiatives in Victoria, rapid desktop research was conducted which considered procurement policies and announced funding (in Victoria and Australia wide), changes to the regulatory landscape and grant programs.</p> <p>While the government does not distinctly outline its expenditure on different sectors of the Aboriginal economy in Victoria, the government has expressed a general commitment to support Aboriginal businesses.</p> <p>The level of support which was indicated via the rapid desktop research was given a rating out of ten according to the below low, medium and high ratings.</p>
Low	There is limited policy support and funding for growth in this sector
Medium	There is partial policy support and funding for growth in this sector
High	There is significant policy support and funding for growth in this sector
Summary	<p>Government support for Aboriginal enterprises and employment is strong in sectors such as tourism, health and social services, clean energy transition, construction, and caring for the country. It also suggests that there is comparatively lower government support for Aboriginal enterprises and employment in sectors like mining, native medicines, waste management, fashion, information media and telecommunications, finance, and insurance.</p> <p>Notably, The Social Procurement Framework (SPF) is applicable to all procurement activities carried out by Victorian government departments and agencies, with the primary objective of maximising the social and economic benefits derived from government purchases. In alignment with this framework, the government has set a 1% procurement target for Aboriginal businesses and established a preferential procurement policy favouring businesses owned by Aboriginal peoples.</p>

Criteria 5 scores by sector



Source: Deloitte scoring system

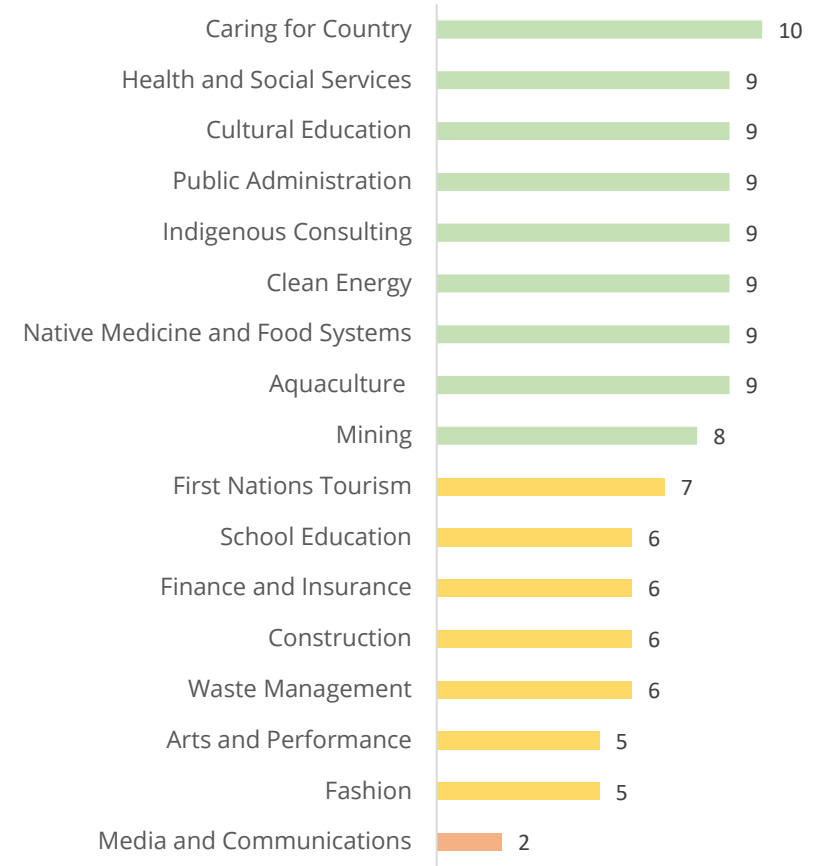
Criteria 6: Alignment with Treaty

The extent to which the opportunity could be enhanced by Treaty

Methodology summary: While no confirmed and exhaustive list of key sectors has been published for focus within the Victorian Treaty, high-level themes have been proposed based on examples within best practice international Treaties and media conversations in Victoria about the upcoming negotiations. This informed the assessment of each sector.

Alignment with Treaty	
Process	<p>Treaty negotiations in Victoria commence in 2024 so by looking at international treaties (in Canada and New Zealand) that have inspired Victorian negotiations, we can better understand what may be included and rank how closely each sector aligns to these trends.</p> <p>According to previous International Treaties and the Aboriginal leaders who are involved in negotiations, the Treaty will impact industries that are closely tied to Land and water use. For this reason, sectors within our analysis performed particularly well when they were closely aligned to land and water use (for example, caring for Country).</p> <p>The water and commercial land use industries themselves were not selected for inclusion within the long list of sectors as they have been considered across all industries through this criteria, and also because they do not provide a unique or high growth offering for Aboriginal businesses in Victoria.</p>
Low	This sector will not be supported / affected / included within the Victorian Treaty negotiations
Medium	This sector may be supported / affected / included within the Victorian Treaty negotiations, but is not likely to be a key feature
High	This sector will be supported / affected / included within the Victorian Treaty negotiations as a priority and key feature
Summary	<p>Areas within the scope of the upcoming Treaty Negotiations are forecast to include the following industries: transport, criminal law, corrections, energy, environment, child protection, health, mental health, creative industries, gaming and liquor control, education, water, police and emergency services, racing, employment, tourism, sport, economic development, roads, fishing and boating, local government, small business, regional development, agriculture, resources, training and skills, family violence, women, youth, housing, and planning.</p> <p>The assumption has been made that the negotiations for these sectors will support greater Aboriginal business involvement in these sectors. The assumption has also been made that the Victorian Treaty negotiations will be inspired International Treaty negotiations.</p>

Criteria 6 scores by sector



Source: Deloitte scoring system

Final scores across sectors

The table below displays all criteria scores across the sectors. The final score is calculated based on an equal weighting of all criteria (the following page includes more detail on weightings).

The final ranking of all sectors indicates that Health and Social Services, Caring for Country and Cultural Education are the top three performing industries.

Rating	Meaning
High	High alignment to criteria
Medium	Medium alignment to criteria
Low	Low alignment to criteria

Criteria:	Economic prospects	Cultural significance	Existing capability	Social Return on Investment	Alignment with policy	Alignment with Treaty	Final score	Top ten ranking
Aquaculture	1	9	2	8	6	9	6	
Mining	4	3	1	5	3	8	4	
Native Medicine and Food Systems	7	9	2	9	6	9	7	6
Clean Energy	4	8	1	9	10	9	7	10
Waste Management	4	6	1	7	5	6	5	
Construction	5	7	9	7	8	6	7	5
Fashion	1	8	2	6	3	5	4	
First Nations Tourism	7	8	2	9	9	7	7	4
Arts and Performance	10	8	2	7	6	5	6	
Media and Communications	1	7	1	7	2	2	3	
Finance and Insurance	3	5	1	8	2	6	4	
Indigenous Consulting	6	8	3	10	6	9	6	8
Caring for Country	9	10	2	9	9	10	7	2
Public Administration	5	7	8	8	2	9	8	9
Cultural Education	9	9	5	9	5	9	7	3
School Education	6	8	5	8	8	6	8	7
Health and Social Services	10	7	10	10	9	9	7	1

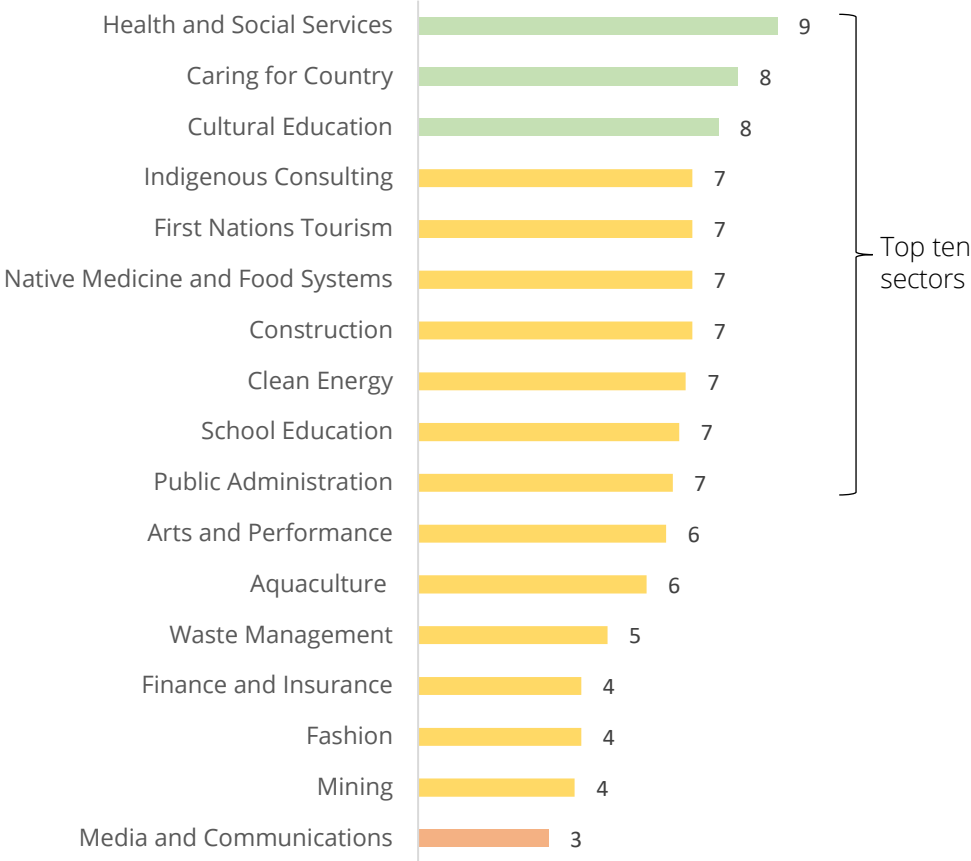


Final scores across sectors – weightings

The final scores allocated to each sector assume an equal weighting for each criteria. In other words, the economic prospects of a sector is equal in importance to its cultural significance, social return, and so on. Scores under this equal weighting are shown in the left chart below. Alternative weighting specifications produce minor changes in the sector scores and top ten sectors. For example, the right chart below shows final scores when higher weightings are given to the quantitative criteria (1 and 3).

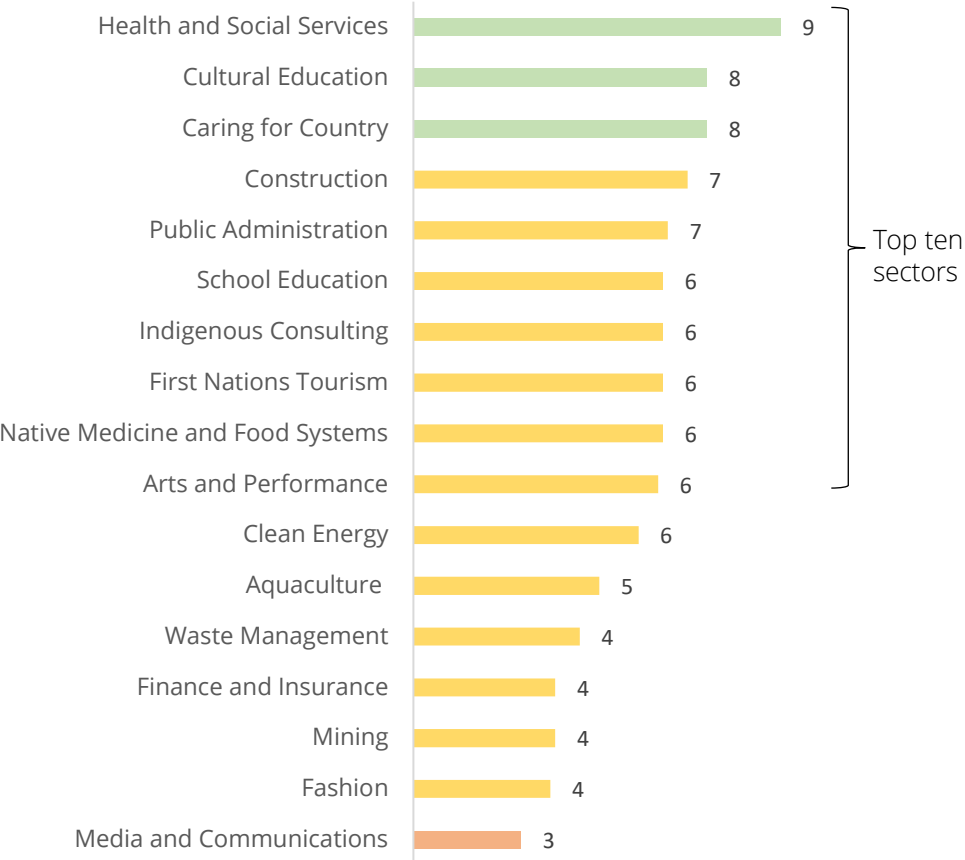
Rating	Meaning
High	High alignment to criteria
Medium	Medium alignment to criteria
Low	Low alignment to criteria

Final scores by sector, equal weighting for all criteria



Source: Deloitte scoring system

Final scores by sector, higher weighting for Criteria 1 and 3



Source: Deloitte scoring system

Final short list of sectors

The final results of the multicriteria analysis indicated the top 10 sectors in the table as having the strongest economic growth potential for TOCs and Victorian Aboriginal businesses in Victoria.

Detailed sector profiles were created for the top 10 sectors and the aquaculture sector, which is an area of interest for FVTOC.

Each profile explores the performance of each sector against each criteria and details the evidence which was used to allocate scores.

No.	Sector	Business opportunities / occupations
1	Health and Social Services	General practitioners, disability and aged care services, mental health and other specialist services, equipment manufacturing and retail, online tools
2	Caring for Country	Scientific testing and analysis, pest control, cultural advisory, conservation, nature reserves, zoological and botanical gardens operation, museums and historical preservation, bio-security
3	Cultural Training	Technical and vocational education and training specialising in cultural competency, tours and on Country education, culturally significant trades, cultural safety training
4	Construction	Residential and commercial construction, land management and protection
5	First Nations Tourism	Marketing, education, touring, accommodation, transport, land management
6	Clean Energy	Micro-grids, hydro, off-shore wind, wind turbines / farming and carbon credit schemes
7	School Education	School education programs, textbooks and resources, educational programs / seminars
8	Native Medicine and Food Systems	Seeds, growing, wholesaling, manufacturing, packaging, retail, tourism, education, science, botanicals, Seeds, growing, wholesaling, manufacturing, packaging, marketing, retail, tourism, education
9	Indigenous Consulting	Architecture, engineering, structural design, scientific testing and analysis, legal, advertising, consulting
10	Public Administration	State/Local Government administration, justice, domestic government Representation, defence, fire protection and other emergency services, public safety services, correctional and detention services, cultural advisory

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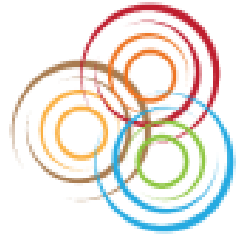
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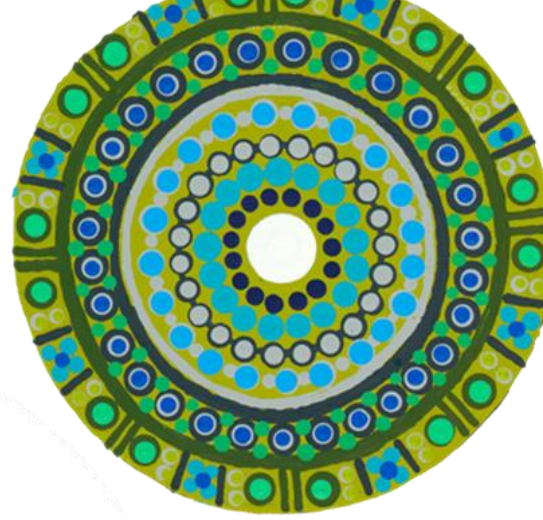
Federation of
Victorian Traditional
Owner Corporations

Federation of Victorian Traditional Owner Corporations

Project 2 - Sector reports

March 2024

Deloitte.



Health and Social Services | Sector Overview

Health and Social Services is the largest sector in Victoria and nationally, driven by significant and growing government investment in health, disability, aged care, allied health and social services, as well as sizeable private and non-for-profit enterprises. Predicted employment gaps particularly in aged care and childcare present opportunities for new businesses.

Sector value

The Health and Social Services sector in Victoria is forecast to grow by **2.9%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, Deloitte Access Economics and IBIS World forecasts.¹
[^]The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment

Health and Social Services is well-represented by the ANZSIC[^] *Health Care and Social Assistance* industry, which is growing faster than any other industry yet still not meeting demand – particularly in aged care and childcare.



1 in 7

Workers in Health Care and Social Assistance in Australia²



78%

Share of workers who are women in Health Care and Social Assistance³



17,000

More direct Aged Care workers needed each year in Australia to meet basic standards⁴



554,000

Total Victorian employment in Health Care and Social Assistance

Sector composition

Key subsectors



Hospitals



Residential care services, including aged care



Dental, allied health and other medical services



Social assistance services, including childcare

Key occupations



Doctors and nurses



Mental health workers

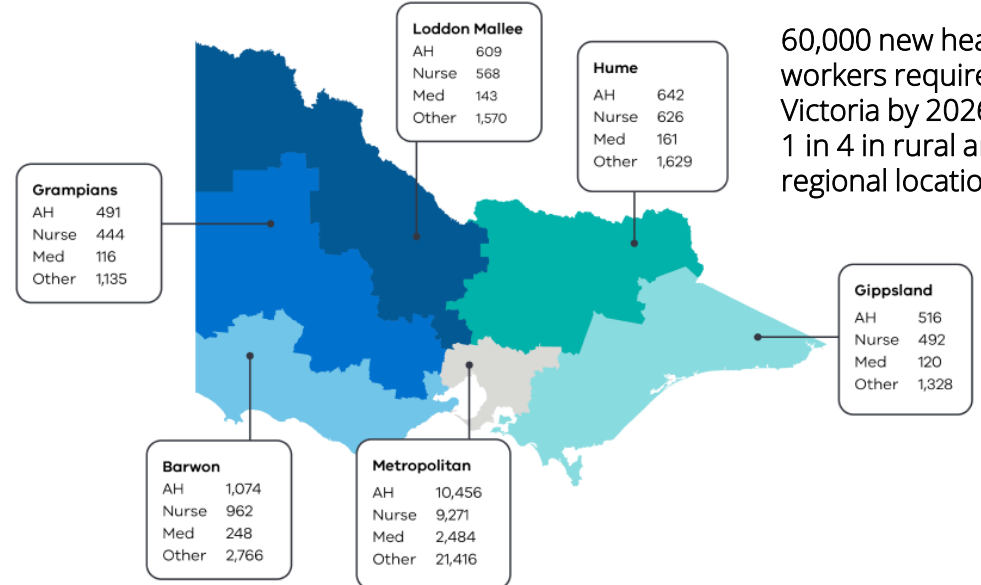


Aged care and child care workers



Health equipment manufacturers

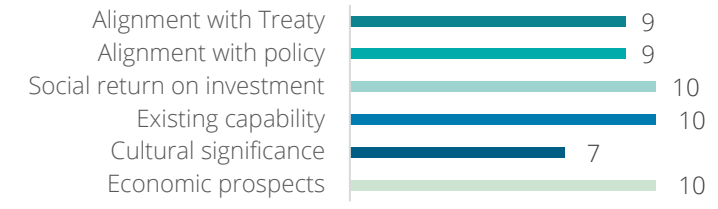
Victorian health workforce employment projections for 2026⁶



60,000 new health workers required in Victoria by 2026, with 1 in 4 in rural and regional locations

Health and Social Services | Insights

Health and Social Services ranked the highest in a multi-criteria analysis of growth industries for Aboriginal employment and businesses, significantly driven by strong economic prospects and existing capability among the Aboriginal workforce.

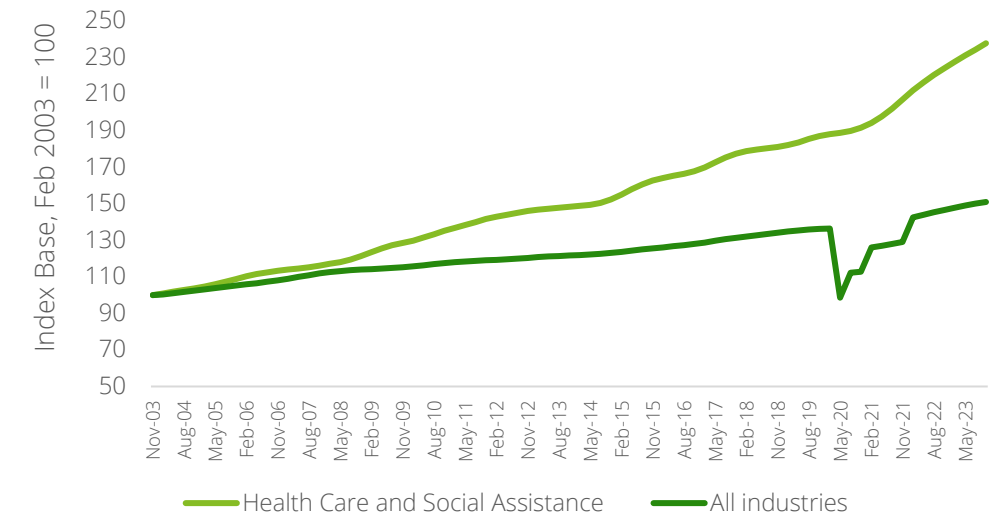


Economic prospects \$

The Health and Social Services sector in Victoria is forecast to grow by 2.9% per year from 2024 to 2028. This follows rapid historical growth of the sector related to structural changes in Australia's economy and demographics, including an ageing population and transition to a services-based economy and greater consumer focus on wellbeing.

Continued growth will be further driven by significant investment in the National Disability Insurance Scheme, new health service infrastructure at the Federal and state levels and increasing demand for childcare.¹ For example, the Victorian Government has committed \$4.9 billion to healthcare in the 2023/24 budget.²

Health Care and Social Assistance & All Industries, Employment Growth³



Existing Capability Ω

Nearly 1 in 6 Aboriginal employees in Victoria (15.4%) work in *Health Care and Social Assistance*, similar to the national level (15.7%) and higher than for non-Aboriginal Victorians, indicating strong representation of Aboriginal capability in this sector in Victoria.

Sector share of Aboriginal Victorian employment
15.4%

Non-Aboriginal Victorians:
14.1%

Aboriginal Australians:
15.7%

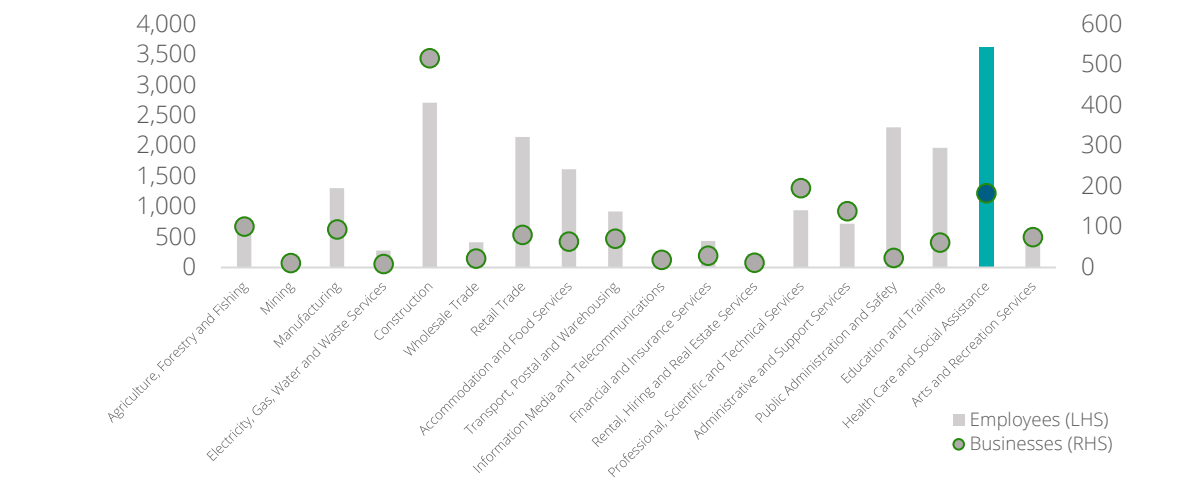
Aboriginal employees represent 0.8% of the *Health Care and Social Assistance* workforce in Victoria, largely in line with the Aboriginal share of the population (0.9%).

Aboriginal share of Victorian sector employment
0.8%

Aboriginal share of Victorian population:
0.9%

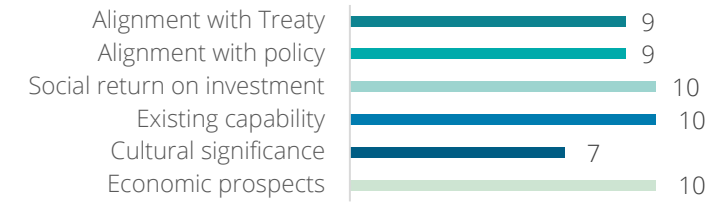
Given its high employment share, there is strong potential to grow the number of Aboriginal businesses in health care and social assistance.

Aboriginal employment and businesses by industry, Victoria, 2021⁴



Health and Social Services | Insights

Health and Social Services was ranked highly in a multi-criteria analysis of growth industries for Aboriginal employment and businesses, partly for its potential to deliver social benefits for Aboriginal Victorians, as well as its alignment with state government policy.



Social return on investment

The Health and Social Services system is not culturally safe for many Aboriginal people in Victoria. Many who present to a hospital emergency department leave before they've even seen a doctor. Even if they are seen and admitted to hospital, Aboriginal people are 2.5 times more likely than non-Aboriginal people to discharge themselves early against medical advice, research from Federation University shows.¹ The number of Aboriginal and Torres Strait Islander Victorians that are homeless has also risen by 40% to 1,109 over the past five years.²

Homeless services, alcohol and drug services, domestic violence, disability services, family intervention services and justice services are all overwhelmed in Victoria with increasing demand for services, but also calls for greater accessibility and improved regulation standards for Aboriginal and Torres Strait Islander people.

In the healthcare sector, work is being done to understand how to make hospitals accessible for Aboriginal people through hospital procedures, staff training and transitions between areas of the hospital, and analysing patient data over the past ten years.³ Notably, Aboriginal provision of health and social care to their own communities supports autonomy, cultural safety and accessibility of services. If community members are receiving the care they require, their quality of living will also improve across a variety of areas.⁴

Patients are also more likely to return for culturally safe care which improves their health outcomes and more evenly distributes the demand for services between all providers, thereby lessening the pressures on the overwhelmed Aboriginal specialist health and social service providers.⁵

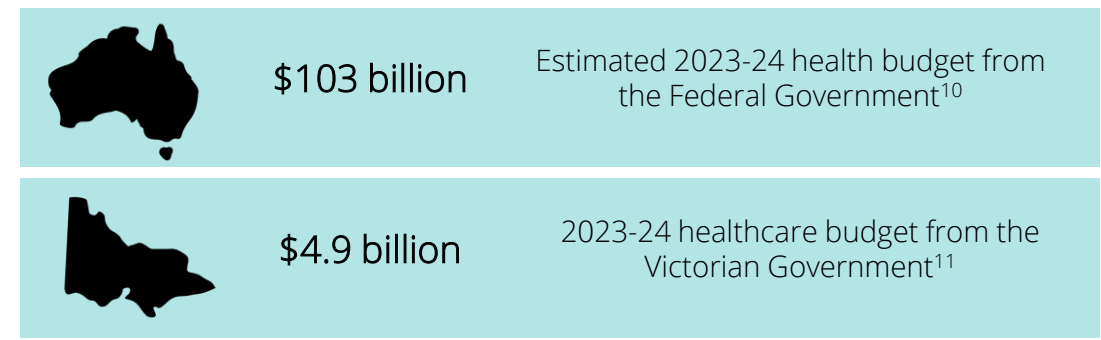
Research demonstrates the significant economic benefits related to health improvements of Aboriginal and Torres Strait Islander community-controlled care. For example, transitioning primary healthcare services to community control in Yarrabah, Queensland, was estimated to deliver benefits of \$1.68 to \$1.82 per \$1 spent.⁶

Alignment with policy

The Health and Social services sector is subject to a large range of regulatory standards but receives consistent Government funding and policy support.⁷ It is a requirement of Victoria's Public Health and Wellbeing Act 2008 to produce a plan every four years. The plan sets out a comprehensive approach to deliver improved public health and wellbeing outcomes for all Victorians.⁸

The Victorian Government also actively collaborates with Aboriginal healthcare providers to deliver culturally competent services, considering the distinct health needs and preferences of Aboriginal populations. This support is evident in initiatives that recognise self-determination in health and social services, transitioning child protection responsibilities to Aboriginal Community Controlled Organisations, and building an Aboriginal Mental Health Workforce.⁹

Capability is likely to improve with policy support. For example, the Victorian Government in collaboration with the Korin Koran Balit-Djak plan has pledged multiple Aboriginal cadetships and scholarship programs for the existing and potential Aboriginal health workforce, signalling strong existing and potential Aboriginal employment in the sector.¹⁰



Health and Social Services | Insights

The Health and Social Services sector has strong alignment with Treaty given its listing as a key priority for negotiations, and it is also expected that higher Aboriginal presence in the sector could deliver substantial cultural benefits for Aboriginal Victorians.

Cultural significance

Traditional medicine practice within Aboriginal and Torres Strait Islander cultures in Australia encompasses a holistic world view, and with the challenges faced in the health and social services sector in Victoria (and across Australia) there is demand for a more wholistic and proactive approach to care and service provision.

This reflects the view of the World Health Organization, which defines health as 'physical, mental and social wellbeing and not merely the absence of disease or infirmity'. Most traditional health care practices believe that the mind and body are inseparable and that to prevent ill health there is a need to maintain a balance between the physical and spiritual selves. Prior to colonisation, traditional forms of healing such as the use of traditional healers, healing songs, and bush medicines were the only form of primary health care.¹

Providing proactive and culturally safe healthcare and social services via greater participation of Aboriginal providers will support Australia's progress towards the Closing the Gap targets which we are currently not meeting.

In particular, this sector supports the following Closing the Gap targets:

1. *Everyone enjoys long and healthy lives*
2. *Children are born healthy and strong*
4. *Children thrive in their early years*
8. *Strong economic participation and development of people and their communities*
13. *Families and households are safe*
14. *People enjoy high levels of social and emotional wellbeing*
17. *People have access to information and services enabling participation / informed decision-making regarding their own lives²*

Alignment with Treaty

Health and Social services has been identified as a key priority for Treaty negotiations in Victoria. The governance and quality standards that are a prerequisite for participation in the health and social services sector are going to be subject to Treaty discussions. This is largely due to the significant gap in current service delivery and demand for quality, timely and accessible services; an example of where this is strongly felt is in the disability services sector whereby growth in the Aboriginal population outpaces the rest of the nation.

Demand for disability services and the participation of Aboriginal people in the NDIS are expected to grow twice as fast as their non-Aboriginal counterparts over the next decade. In contrast to this, after accounting for differences in demographic factors, disability, and geographical region of the constituents they service, Aboriginal-focused providers receive a lower average payment amount per participant serviced compared to non-Aboriginal service providers³.

Treaties between Indigenous peoples and governments in New Zealand and Canada have been listed as an example from which the Victorian Treaties will be drawing inspiration, inclusions of these that have been specifically mentioned which relate to this sector include: health, family and social services.⁴

Policy example: Self-determination

The Victorian Government is seeking to improve cultural safety in healthcare for Aboriginal people by improving self-determination and community control. Since 2017, the Victorian Government has committed to transitioning child protection responsibilities of Aboriginal children and young people to Aboriginal Community Controlled Organisations.⁵

The Victorian Government has also committed \$5.6m of funding over 5 years to building an Aboriginal Mental Health Workforce through a scholarships program providing professional development and training for Aboriginal people seeking to work in the sector.⁶



Health and Social Services | References

Sector overview

1. This reflects the average of two key datasets:
 - Deloitte Access Economics forecast, Victoria: Healthcare and Social Assistance (2.9%)
 - IBIS World forecast, Australia: Health Services (3.1%), General Practice Medical Services (3.2%), Specialist Medical Services (5.2%), Other Health Services (4.1%), Aged Care Residential Services (5.4%), Crisis and Care Accommodation (1.9%), Community Services (4.7%), Child Care Services (4.0%), Personal Welfare Service (3.8%)
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3. ABS, Aug 2021. [Labour Force, Australia](#)
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3. Royal Commission into violence, abuse, neglect and exploitation of people with disability, 2023. [Options to improve service availability and accessibility for First Nations people with disability](#)
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5. Victoria State Government, 2024. [Transitioning Aboriginal children and young people to ACCOs](#)
6. Premier of Victoria, 2022. [Building Our Aboriginal Mental Health Workforce](#)

Caring for Country | Sector Overview

Opportunities for Caring for Country are growing in Victoria, including in nature repair markets, pest control and landscaping services. Traditional Owner Groups are increasingly in demand by private landholders, for example in the cultural fire space, while the land handbacks that are likely to take place through the Victorian Treaty negotiations may provide opportunities tied to Traditional Owner Group agreements with the Victorian Government.

Sector value

The Caring for Country sector in Victoria is forecast to grow by **3.1%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, Deloitte Access Economics and IBIS World forecasts for aligned industries.¹
^ The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment and context

The Caring for Country sector draws from multiple industries and occupations. This report uses data from the ANZSIC^ *Administrative and Support Services* industry, which includes pest control and gardening services. Nationally, Aboriginal rangers represent a key occupation in this sector, but there are opportunities to better support ranger programs in Victoria.

1,900
Individuals employed under the Indigenous Ranger program nationwide²

5x
Indigenous Protected Areas in Victoria

3x
Indigenous Protected Areas Consultation Projects³

6
Agreements between the Victorian government and Traditional Owner Groups⁴

15,700
Employees in Nature Reserves and Conservation Parks in Australia⁵

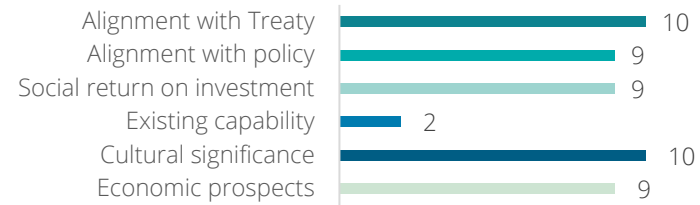
Sector composition

Key subsectors		Key occupations	
 Traditional land management and advisory	 Nature Reserves and Conservation Parks Operation	 Park ranger	 Landscape architect
 Zoological and Botanical Gardens Operation	 Pest Control and Other Support Services	 Aboriginal cultural practitioner	 Environmental scientist



Caring for Country | Insights

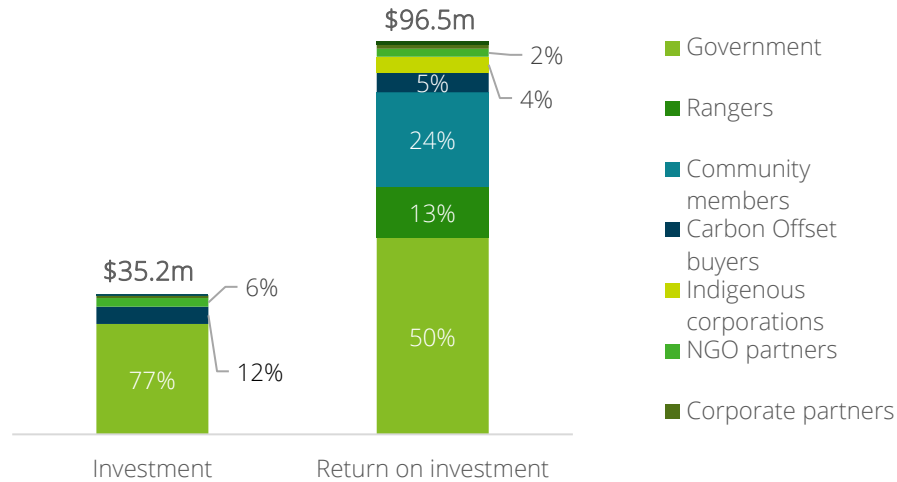
Caring for Country ranked highly in a multi-criteria analysis of growth industries for Aboriginal employment and businesses. While assessment of the sector's economic prospects generated strong results, existing capability of the sector performed relatively poorly and is largely a result of the alignment of the Caring for Country sector to the *Administrative and Support Services* ANZSIC industry, rather than a clear reflection of the sectors' existing capability.



Economic prospects \$

More recently, demand for Aboriginal land and sea management services has skyrocketed in pockets of the country following the emergence of Indigenous Protected Areas (IPAs). This coupled with considerable backing from government programs and the rise of carbon credits has contributed to strong economic prospects.¹ In a social return on investment study on IPAs by Social Ventures Australia, it was estimated that these areas had a return of \$96.5 million for a \$35.2 million investment over 6 years (29% per year).² The study revealed great value is generated through the creation of ranger employment opportunities, provision of sufficient resources and investment into management capacity of ranger aligned work.³

Impact of Aboriginal Protected Areas, Australia⁴

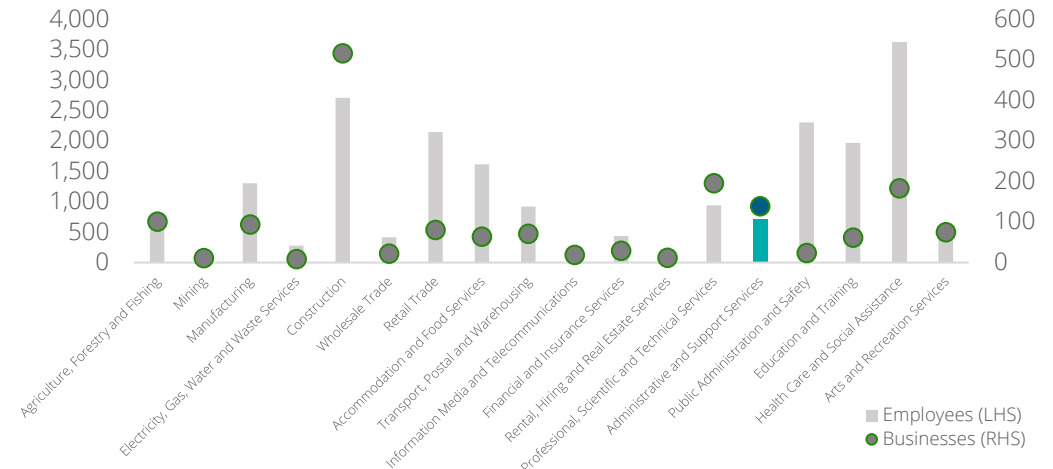


Notably, the Indigenous Ranger Program in Victoria is considerably smaller than in other jurisdictions.⁵ Greater investment and support of ranger businesses for Traditional Owners in Victoria could unlock significant activity.

Existing Capability Ω

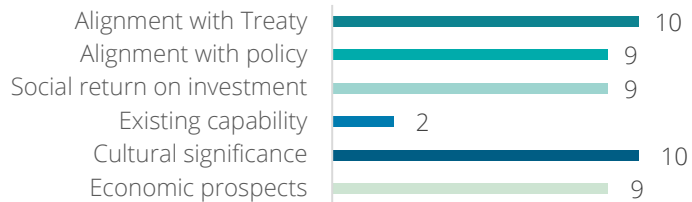


Aboriginal employment and businesses by industry, Victoria, 2021⁶



Caring for Country | Insights

Caring for Country has significant social benefits related to improved cultural outcomes for Aboriginal people. Policy is also supportive of Caring for Country, at state and Federal levels, with some identified opportunities for greater support.



Social return on investment

Caring for country is necessary for the health of the land; many Aboriginal people feel that the land is wild or sick if not managed by its people. This is a reciprocal relationship, as reflected in the familiar saying by Aboriginal people that ‘if you look after the country, the country will look after you’.

Moreover, the land is a sentient participant in this engagement: people talk about country in the same way that they would talk about a person: they speak to country, sing to country, visit country, worry about country, feel sorry for country, and long for country; because of this richness, country is home, and peace; nourishment for body, mind, and spirit.¹

There is increasing recognition of this connection to the land and the related value of Aboriginal and Torres Strait Islander people’s knowledge and skills in natural resource management and adaptation to the effects of climate change. Proactive land management plays a critical role in natural disaster readiness and climate resilience.

This is also linked to Aboriginal people maintaining a better cultural connection to Country and to their families, which greatly increases their social and emotional wellbeing and physical health through healthy lifestyles.²

Alignment with policy

There is substantial policy support for land conservation and protection, and there are compelling links between this work and the strong connection Aboriginal communities have to the land and their deep knowledge of sustainable resource management practices.³ The government is enthusiastic about partnering with Communities to encourage environmentally friendly and sustainable land practices and conservation. This is particularly important in the wake of Australia’s commitment to the Kunming-Montreal Global Biodiversity Framework, and committed to action on Target 3 by protecting at least 30% of our lands and oceans by 2030 (known as the 30x30 commitment). Australia is making progress towards this target, with approximately 22% of land already protected, and bipartisan political support across federal, state and territory jurisdictions for a coordinated national approach.⁴

In keeping with this sentiment, the Victorian Government announced in its 2023 Budget a tax offset for private landholders who are using their property for conservation purposes and / or looking to enter into environmental market arrangements.⁵

On 16 September 2020, the Heritage Chairs of Australia and New Zealand welcomed and supported Dhawura Ngilan: A vision for Aboriginal and Torres Strait Islander Heritage in Australia and the Best Practice Standards in Aboriginal cultural heritage management and legislation. This document provides a roadmap for improving approaches to Aboriginal and Torres Strait Islander heritage management in Australia and has been implemented within Victoria. Notably, Traditional Owners from across Australia have suggested that the standards outlined within this document have not been adequately upheld and suggested that Aboriginal intervention and greater autonomy would support greater alignment.^{6,7}

Opportunities for greater policy support in this sector include:

- The Nature Repair Market was established nationally in 2023, which will incentivise private finance into land and water conversation and protection. This represents a significant opportunity for Traditional Owner Groups.⁸
- Significant policy support opportunity exists in strengthening the proportion of funding dedicated to the Victorian Indigenous Ranger Program; Victoria represents a small current proportion of the Indigenous Ranger Program, The growth of this support would equate to significant economic growth opportunities for First Nations Victorian land management.⁹

Opportunities/risks for Aboriginal businesses: Treaty and land handbacks
 Land handbacks, forecast to take place through the Victorian Treaty negotiations, will provide Aboriginal people the opportunity to showcase best practice land management techniques and educate the public of their effectiveness. Prior to this, the limited existing market understanding of traditional services may mean that clients undervalue the service offering. As such, businesses could consider education programs to illustrate how their services are based on longstanding traditional knowledge and expertise.¹⁰



Caring for Country | Insights

The cultural benefits of Caring for Country are profound and more significant than in other sectors. Treaty is expected to support further opportunities in this sector.

Cultural significance

Aboriginal people have had a relationship with Country that goes beyond land management. Aboriginal connection to Country links the Aboriginal dream time, identity, belonging, spiritual connection, cultural practices, custodianship and responsibility. One part of this deep and complex relationship with Country is its preservation; they have cared for and sustainably managed Victoria's landscapes for tens of thousands of years.

Traditional Owners have both a cultural obligation and a legal right to be custodians of their traditional land and waters and protect the unique natural and cultural values that they contain. When Aboriginal knowledge is respected to lead the way in land management, better outcomes are possible for all.¹

Sub-sector example: Cultural burning

Cultural burning is a cultural fire practice used by Aboriginal people to improve the health of Country and its people. It has been used for over 60,000 years to manage land, plants and animals. The dispossession of land and loss of identify has meant that cultural burning has not occurred over large parts of Australia for many generations, but there is increasing awareness of the important role it can play in the mitigating the effects of extreme bush fires caused by climate change.²

Alignment with Treaty

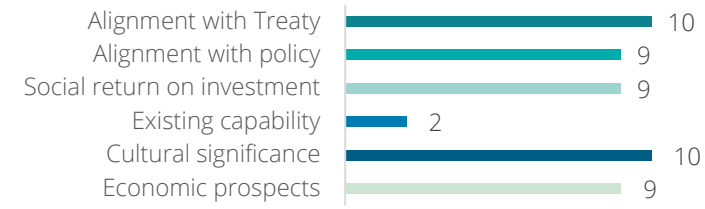
Treaties in New Zealand and Canada include traditional relationships with land and waters, economic underpinnings for Caring for Country, land and water hand backs and entitlements, national park management.³

Co-chair, Ngarra Murray, of the First Peoples' Assembly has said that her "vision for treaty is a future that respects our rights, dignity and sovereignty as the First Peoples of this land and a healed and healthy country for all of us" implying the considerable planned action towards Caring for Country as part of the upcoming Treaty negotiations.⁴

Policy example: Traditional Owner agreements

The Victorian government currently has agreements with six Traditional Owner groups.⁵ The agreements recognise that each group is the traditional owner of their respective land, finalises native title claim and provides each group with the rights in relation to access, ownership and management of their respective lands. The State government (since 2021) has offered Aboriginal Caring for Country grants to support projects that provider Traditional Owners with opportunities to access and connect with country.⁶

Parks Victoria have also made a commitment to 'Managing Country Together' forging strong partnerships with Traditional Owners to protect Aboriginal cultural heritage sites.⁷



Caring for Country | References

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4. Social Ventures Australia, 2016. [Consolidated report on Indigenous Protected Areas following Social Return on Investment Analyses](#)
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4. The Nature Conservancy, WWF Australia, Australian Land Conservation Alliance and Pew Charitable Trusts, 2024. [Protecting Australia's Nature](#)
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2. Teaching Aboriginal and Torres Strait Islander culture, 2023. [Teaching Aboriginal and Torres Strait Islander culture](#).
3. First Peoples' Assembly of Victoria, 2024. [Empowering Traditional Owners](#).
4. ABC News, 2023. [Victorian traditional owners prepare for historic statewide treaty negotiations](#).
5. Victoria State Government, 2024. [Agreements with Traditional Owners](#)
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7. Parks Victoria, 2024. [MANAGING COUNTRY TOGETHER](#)

Cultural Training | Sector Overview

Cultural Training is increasingly being demanded in workplaces and other settings, requiring Aboriginal trainers, educators and experts. Vocational education more broadly is growing due to a rising population, strong government investment and initiatives to boost participation in education and training.

Sector value

The Cultural Training sector in Victoria is forecast to grow by **3.1%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, Deloitte Access Economics and IBIS World forecasts for aligned industries.¹

[^]The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment and context

Cultural Education is aligned with the ANZSIC[^] *Education and Training* industry, with a particular alignment to the *Technical and Vocational education* sub-industry.

Practitioners specialise in cultural education and cultural competency.



8.4%

Share of workers in Education and Training in Australia²



72%

Share of workers who are women in Education and Training³



306,000 in 2024

Total Victorian employment in Education and Training⁴



17

Units related to diversity in vocational and educational training programs⁵

Sector composition

Key subsectors



Workforce education including cultural safety training



On Country education programs



Cultural education materials production

Key occupations



Traditional Owner Welcome to Country and cultural education discussion



Cultural safety trainer



Museum and cultural centre owner and/or operator



Aboriginal historical, cultural and social formal education teachers

Drivers

Organisations are increasingly recognising the need for greater cultural competence and understanding in workplaces, for reasons such as:

1

Better meeting the needs of a diverse consumer base

2

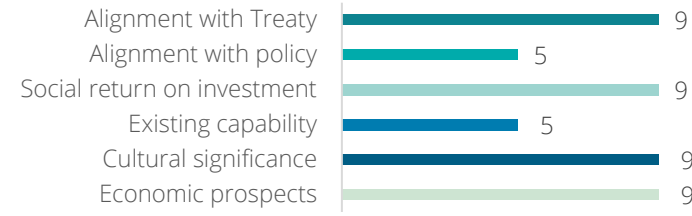
Attracting and retaining a diverse workforce

3

Implementation of Reconciliation Action Plans⁶

Cultural Training | Insights

Cultural Training ranked highly in a multi-criteria analysis of growth industries for Aboriginal employment and businesses, significantly driven by economic prospects of the sector. Existing capability of the sector is also promising, performing well relative to other sectors.

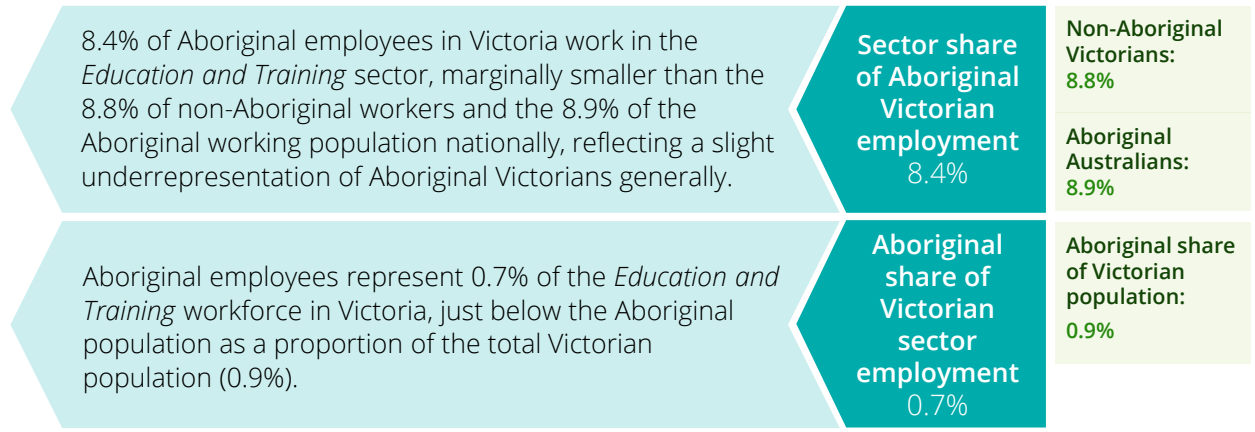


Economic prospects \$

The education and training sector broadly is expected to experience high rates of growth over the next five years, largely a product of a growing population, heavy investments from governments, and initiatives to boost participation.¹

Simultaneously, recent years have seen a strong surge in demand for Aboriginal cultural competence and awareness training offerings given proven improvements to service delivery, and employee tenure and retention.²

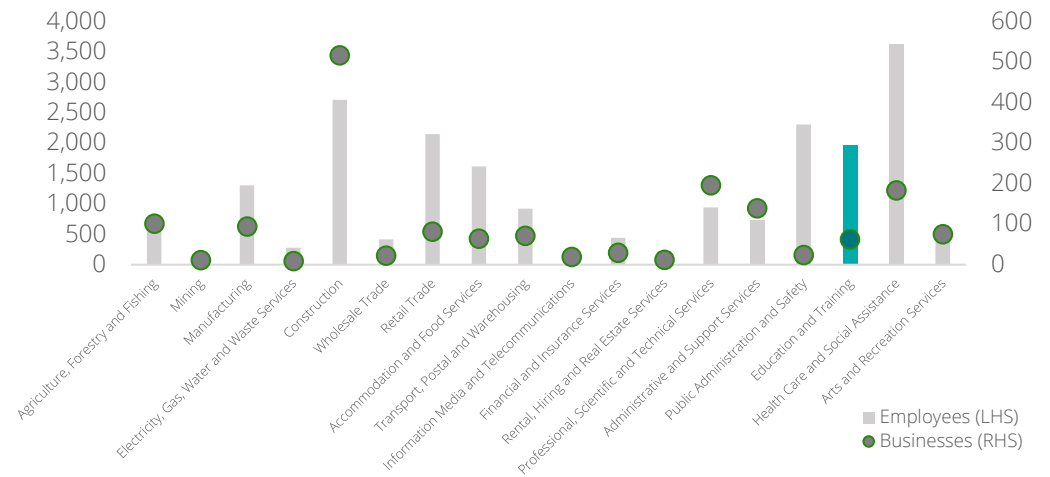
Government departments and organisations in particular have strong demand for training where they provide services to Aboriginal communities. There is also a large increase in the supply of institutions offering Aboriginal cultural awareness training.³



Existing Capability Ω

Given its strong employment share, there is strong potential to grow the number of Aboriginal businesses in education and training.

Aboriginal employment and businesses by industry, Victoria, 2021⁴





Cultural Training | Insights

Cultural Training supports self-determination and autonomy for Aboriginal workers with flow-on effects for the broader Victorian community. Policy support is not as strong as for other sectors, but still evident through a focus on culturally competent workforces and investment in cultural heritage.

Social return on investment

Being able to express culture and educate others on culture is associated with autonomy and self-determination for Aboriginal workers in this sector.

There are flow-on benefits for the broader Aboriginal community of the Victorian population having a better understanding and appreciation of Aboriginal culture.

Exploring the importance of cultural education is also essential for building empathy, understanding, and respect among people of different backgrounds, while also equipping individuals with knowledge and skills to be successful in an increasingly globalized world.¹

Developing cultural competency leads to more effective communication with people from different backgrounds, and also increases our ability to navigate unfamiliar situations. This can help to build relationships, foster collaboration, and create a more unified society. In Victoria, a particularly diverse state, cultural education helps to reduce racism, increase cultural celebration between cohorts and contributes to reconciliation.²

Alignment with policy

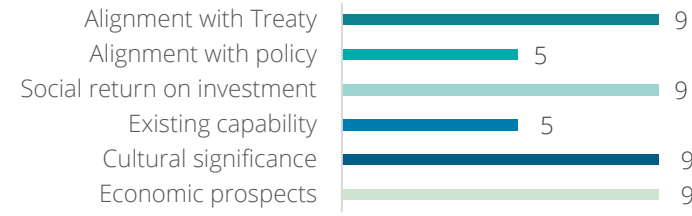
While there is significant funding surrounding Aboriginal culture, many of these investments are split between the Education, Tourism and Arts and performance industries in Victoria. Progress towards integrating high quality cultural education into the learning environments and making cultural safety education a standard in each workplace is limited.

The Federal National Roadmap for Aboriginal Skills, Jobs, and Wealth Creation highlights an increased focus on building cultural competencies. This emphasis aims to achieve culturally safe workplaces, creating potential demand for Aboriginal trainers, educators, and experts to deliver culturally sensitive training programs and workshops.³

During 2021-22, the Victorian Government through Creative Victoria and other portfolio areas, provided \$745.0 million to support cultural activities and businesses across the state. This represented a decrease of 3% or \$26.9m from 2020-21. This slight decrease follows unprecedented growth of 40% over the previous 12 months.

The Victorian Budget 2022/23 has also invested in Victoria's Aboriginal cultural heritage system, with \$35.7 million to promote, protect and celebrate Victoria's invaluable Aboriginal cultural heritage.⁴

As part of the Labor Government's Marrung Education Plan to support Koorie students and embed Victoria's Aboriginal culture in the education system, \$2.8 million will establish a new Certificate IV-level course to build a new team of specialist teachers to revive language on Country and in classrooms and kindergartens.⁵



Cultural Training | Insights

The cultural significance of Cultural Training is significant due to the opportunities for storytelling and truth telling, which are set to be recognised in Treaty.

Cultural significance

Koorie and other Aboriginal and Torres Strait Islander cultural heritage, including cultural expression, is the intellectual property of Koorie and other Aboriginal and Torres Strait Islander people. Cultural expression includes stories, poetry, songs, instrumental music, dances, plays, ceremonies, rituals, performances, symbols, drawings, designs, paintings, body paintings, carvings, sculptures, handicrafts, baskets, needlework, textiles, artefacts and instruments. These things were historically passed down through generations of Aboriginal people in traditional knowledge sharing and customs.¹

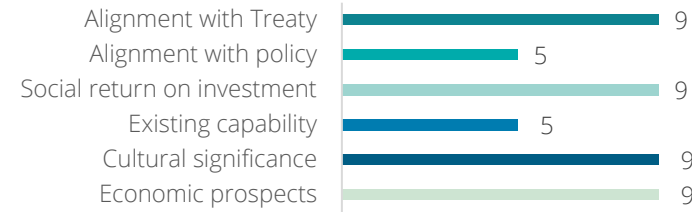
Aboriginal cultural training stems from storytelling through art, and truth telling verbally from generation to generation. Lore, cultural practices, Aboriginal skills, history and their connection to Country all make up information that is culturally significant and also often part of what is included within Cultural Training.

Cultural Training in Victoria is a unique and sought after market for Aboriginal people in Victoria to lead. This kind of education can only be provided by them and by educating their own communities and outside, they are continuing and preserving these cultures and practices. Cultural education is also in demand by a range of target markets; tourists, workplaces, and governments.

Aboriginal sub-sector example: Health
Victorian Aboriginal Community Controlled Health Organisations* offer cultural safety training to individuals, groups and organisations committed to improving services for Aboriginal peoples in the health and wellbeing sector.²

Aboriginal sub-sector example: Law
Terri Janke and Company is a 100% Indigenous owned and run law firm that empowers clients to achieve success in business and innovation and has particular expertise in Commercial Law and Indigenous Cultural and Intellectual Property (ICIP).³

Aboriginal business example: The Koorie Heritage Trust
The Koorie Heritage Trust* offers cultural experience programs such as guided walking tours, Aboriginal cultural competency building, and cultural safety in the workplace training. The Trusts' prime location in Federation Square also hosts exhibitions, Blak design, collections and events for visitors.⁴



Alignment with Treaty

Treaties in New Zealand and Canada include the ability to practice and revitalise culture, language and heritage.⁵ As stated by the Minister for Aboriginal Affairs Gabrielle Williams when addressing the announcement of the Victorian Budget 2022/23, *“These investments will ensure we’re protecting and celebrating Aboriginal cultural heritage across Victoria, so it can be cherished for generations to come.”*^{6,7,8}

At a recent Treaty Day Out event on Dja Kourie Wurrung country in Bendigo, Aboriginal and non-Aboriginal Victorians came together to reflect on the possibilities of treaty. Based on the community conversations held over the past few years, a statewide treaty is likely to cover issues across every facet of life, including cultural heritage, language preservation, law and order, the environment and education.^{8,9,10,11}

As part of the Treaty negotiations and expansion of application of cultural related services in Victorian sectors, Cultural Intellectual Property regulation and protection must be invested in. This should be a priority for any businesses entering into these sectors and the non-Aboriginal businesses working alongside them.

Opportunities/risks for Aboriginal businesses
Due to colonisation, many communities have experienced a loss in language and access to cultural practices, which may affect both the willingness and ability of Victorian Traditional Owners to share traditional knowledge, language and history for public education programs. Additionally, as a result of the campaign for the Voice referendum and upcoming Victorian Treaty negotiations, many of the Victorian Traditional Owners and Aboriginal leaders are experiencing fatigue which may also affect their willingness and capacity to provide cultural education.

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 - Deloitte Access Economics forecast, Victoria: Education and Training (3.0%)
 - IBIS World forecast, Australia: Technical and Vocational Education and Training (3.2%), Art and Non-Vocational Education and Training (3.3%).
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First Nations Tourism | Sector Overview

The tourism industry is bouncing back in Victoria following the Covid-19 pandemic, with local and overseas visitors returning to Melbourne as well as regional Victoria. First Nations tourism experiences are one key component of visitor demand, driving Aboriginal employment in multiple industries and occupations.

Sector value

The First Nations Tourism sector in Victoria is forecast to grow by **2.7%** per year from 2024 to 2028*

*Compound annual growth rate; ATIC forecast for visitor growth to Victoria, and Gross Value Added for IBIS World forecasts for aligned industries.¹

[^]The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment and visitors

The First Nations tourism sector draws from multiple industries and occupations. For employment, this report uses data from the ANZSIC[^] Arts and Recreation, Accommodation and Food, and Food and Beverage industries. These sectors rely on strong visitor growth and spend in Victoria, which has bounced back since Covid.



2.5 million

Australians and visitors took part in an Aboriginal tourism experience in 2019²



90 million

Total visitors to Victoria in 2023, up 20% from the year prior³



\$34 billion

Total tourism spend in Victoria in the year ending September 2023⁴



17%

Increase in total tourism spend in Victoria in 2023 compared to pre-Covid⁵

Sector composition

Key subsectors



Cultural tours and emersion



Accommodation



Aboriginal storytelling



Nature and wildlife experiences

Key occupations



Tour guide



Hotel manager

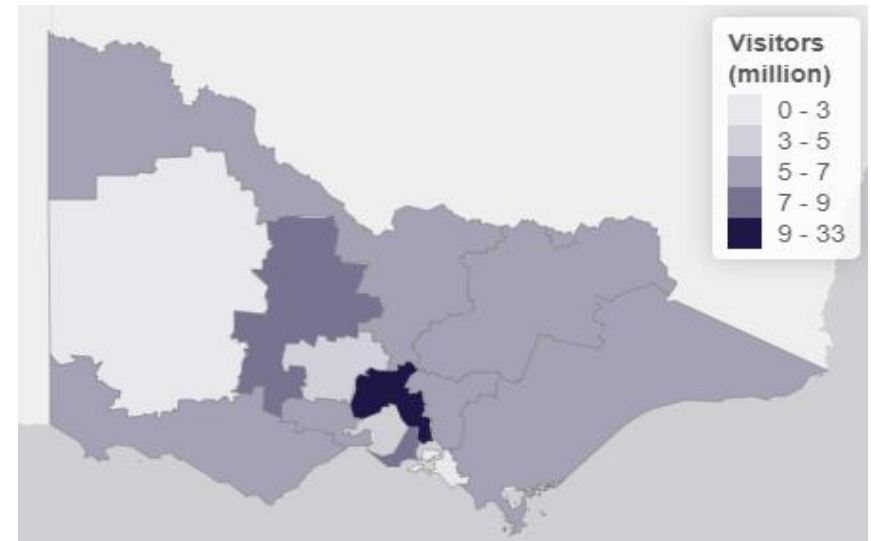


Travel agent



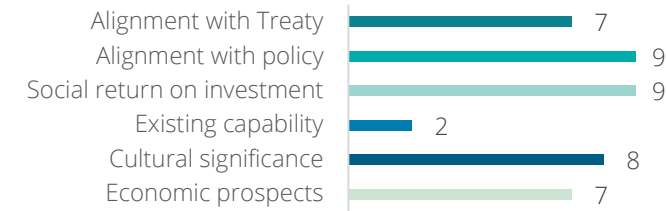
Wildlife experts

Visitors to Victoria's tourism regions in the year ending September 2023⁶



First Nations Tourism | Insights

First Nations Tourism has relatively strong economic prospects but poor existing capability, as compared to other industries in a multi-criteria analysis of growth industries for Aboriginal employment and businesses.



Economic prospects \$

In the year ending September 2023, tourism spend in Victoria totalled \$34 billion.¹ As at September 2023, visitors to Victoria increased 20% compared to the year ending September 2022 with total visitors amounting to 90.3 million.² Furthermore, domestic visitor nights alone are expected to increase by 2.7% on average per year over the next five years.³

Interest in Aboriginal tourism experiences has also grown strongly over the past decade with 2.5 million Australians and visitors taking part in an Aboriginal tourism experience in 2019, up 42% from 2013.⁴ 459,400 international and domestic visitors participated in an Aboriginal activity in Victoria, spending \$1.1 billion and 7.6 million nights in the year ending December 2019.⁵

However, Tourism Victoria's research into First Nations Tourism revealed the majority of visitors are simply superficially engaging with Aboriginal culture (for example, displays and galleries) as opposed to immersive experiences. Thus, there is a large opportunity to invest in garnering genuine interest for Aboriginal activities, which will particularly strengthen economic development opportunities for TOCs by whom the rights to such Indigenous Cultural and Intellectual Property are managed.⁶

Existing Capability Ω

There are an estimated 233 Aboriginal businesses in tourism-aligned industries of accommodation, manufacturing and arts and recreations.

Notably, other estimates indicate there are 500 Aboriginal-owned tourism businesses across Australia.⁷

After accounting for all industries aligned to First Nations Tourism, on average, 3.8% of the Victorian Aboriginal workforce are employed by the sector. This is slightly greater than the Non-Aboriginal Victorian workforce share (3.3%) and the national Aboriginal workforce share (3.6%)

Sector share of Aboriginal Victorian employment
3.8%

Non-Aboriginal Victorians:
3.3%

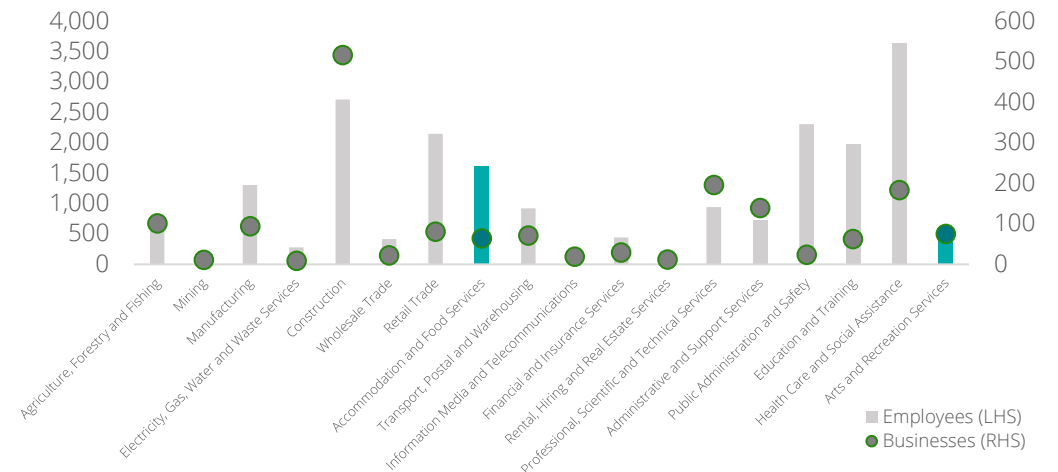
Aboriginal Australians:
3.6%

Aboriginal employees on average represent 0.9% of the industries making up the tourism workforce in Victoria, in line with the Aboriginal share of the Victorian population.

Aboriginal share of Victorian sector employment
0.9%

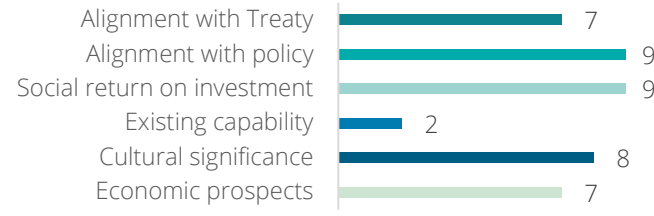
Aboriginal share of Victorian population:
0.9%

Aboriginal employment and businesses by industry, Victoria, 2021⁸



First Nations Tourism | Insights

First Nations Tourism has strong potential to boost social outcomes for Aboriginal communities, through economic empowerment as well as cultural connection. The sector is also strongly supported by policy, such as numerous grants from the National Indigenous Australians Agency .



Social return on investment

Creating a strong connection between economic development and First Nations tourism ensures that the places and practices being shared will be celebrated and protected. Protection of cultural sites and practices will also create protection for connection to culture and the longevity of this for future generations. This can also contribute to reconciliation efforts and support Aboriginal peoples to maintain connection to Country.¹

Aboriginal communities are increasingly turning toward Aboriginal tourism to diversify their economic base, validate their claims related to proprietary rights over traditional lands and re-connect youth with elders and the community to their land and their culture. Oftentimes, these development initiatives are tied to broader community development goals, yet the success of the tourism project is generally measured by its market readiness, revenue generation and job creation.²

Aboriginal business example: Tjapukai Aboriginal Cultural Park

The Djabugay people live near Cairns, a tourist destination in North Queensland, on land to which they “belong” and which traditionally “belongs” to them. Their community is an equity partner in the Tjapukai Aboriginal Cultural Park that features Djabugay culture and where community members work as employees.

The benefits of tourism identified by this study included revival of Djabugay culture; employment opportunities; working together with other Djabugay community members; increased cross-cultural understanding; and improved material welfare. However, disadvantages such as degradation of Djabugay culture; exploitation of the Djabugay community; minimal tourist/Djabugay interaction; and limited material improvement for the Djabugay were also revealed.³

Alignment with policy

There is strong policy backing for First Nations tourism, driven by the uniqueness of cultural experiences offered by Aboriginal communities. The *First Peoples Tourism Plan* is a priority, and tourism infrastructure projects are receiving significant funding. Various grants to Traditional Owners and Aboriginal majority-owned businesses further demonstrate a comprehensive and substantial commitment to First Nations tourism.⁴

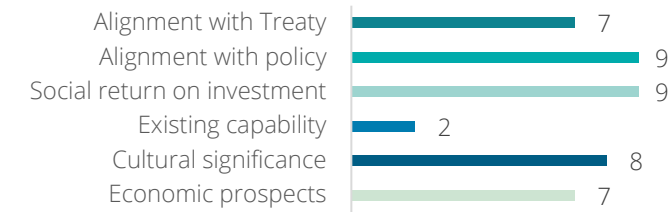
Tourism grant opportunities have been provided by the National Indigenous Australians Agency (NIAA) to assist Aboriginal owned businesses and community organisations to invest in new equipment, develop new and extend existing activities, plan for future opportunities and strengthen marketing in the tourism sector.

Through two grant opportunities, \$9 million has been offered to support First Nations tourism operators. These grants have been capped at \$50,000 for Aboriginal owned tourism businesses and \$100,000 for Aboriginal community organisations.⁵ Adjacent to this, the First Nations Tourism Mentoring Program will offer place-based, tailored services from industry experts, to support First Nations tourism businesses across the country. The program will assist operators to take full advantage of the increasing market for visitors interested in experiencing cultural tourism activities.⁶

The NIAA is also working with the Australian Government to co-invest with state and territories in large scale First Nations tourism projects. This will stimulate and strengthen the economic participation of Aboriginal peoples and communities in the Visitor Economy.⁷

First Nations Tourism | Insights

First Nations Tourism can provide material cultural benefits with communities showcasing and sharing culture and Country with visitors. Treaty negotiations are expected to recognise this and provide opportunities for First Nations tourism businesses.



Cultural significance

While Aboriginal communities would not have typically practiced tourism in the way we do today, knowledge sharing is the way in which tradition, culture, history, learnings, survival and community practices were all passed down from generation to generation. From this perspective, Aboriginal communities were the creators of this style of knowledge exchange.¹

First Nations tourism is centred around showcasing and sharing material cultural artefacts. Often culturally material artefacts are protected from public view and use due to the sacred nature traditional use, fragility and the strength of connection at a site. For the times that a site is able to be shared with the public, the tourism offering is central to Aboriginal culture and connection to Country and is a unique offering to that community.

First Nations tourism is a popular and foundational part of tourism in Victoria. Aboriginal businesses in the First Nations tourism sector logically have competitive advantage as the owners and custodians of the local traditional knowledge, cultural practices, history, lore, and language. It can also be understood that any Australian tourism is First Nations tourism, as Aboriginal communities are welcoming visitors to their land and country.

Aboriginal business example: Wurundjeri Cultural Tours

Wurundjeri Cultural Tours* is organisation owned and operated by the traditional custodians of Melbourne and surrounding lands who run guided tours around the Dandenong region. The project is supported by the Wurundjeri Woi Wurrung Cultural Heritage Aboriginal Corporation and receives funding from the Federal Government's National Landcare Programme.²

Alignment with Treaty

Treaties in New Zealand and Canada include recognition of historic wrongs and ongoing injustices, recognition of self-determination and self-government, rights to access and manage land and resources, health, education, and economic development and the rights to practice and revitalise culture, language and heritage. All of these items are part of the 'how' or 'why' of the First Nations tourism sector in Victoria and will be supported by Treaty.^{3,4,5,6,7}

Considerations for Aboriginal presence in the sector: Compensation and proper use of Country

The Victorian Treaty negotiations are forecast to increase economic opportunities for First Nations tourism. Traditional Owners and tourism businesses should therefore discuss adequate compensation and permission process for accessing culturally significant sites and for using cultural heritage / knowledge for tourism purposes. In parallel, considerations must be taken to prevent the risk of clients and the public who may mistake their limited access to Country (through a tour and other activities) with permission for access outside the tour and may lead to damages and mistreatment of Country.

Aboriginal business example: Budj Bim Tours

Budj Bim Tours* operates as a tourism company offering guided tours through South West Victoria. Outside of traditional nature tours, the Budj Bim houses the Tae Rak Aquaculture Centre designed to showcase the world's oldest and most extensive aquaculture system alongside traditional food offerings. The organisation receives backing from 2 separated Aboriginal Traditional Owner Corporations and Parks Victoria.⁸

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 - Australian Tourism Industry Council forecast, Victoria; Visitor growth to Victoria (2.7%),
 - IBIS World forecast, Australia: Tourism (5.7%), Hotels and Resorts (2.2%), Specialised Design Services (-0.1%), Art and Non-Vocational Education (3.3%), Travel Agency and Tour Arrangement Services (5.0%), Motels (2.5%), Serviced Apartments (2.5%), Caravan Parks, Holiday Houses and Other Accommodation (1.1%).
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Construction | Sector Overview

Construction is the second largest employer in Victoria, driven by significant public and private sector activity in residential and commercial infrastructure. Investment in construction is set to continue growing steadily, but potentially at lower rates than have been experienced due to supply chain issues caused by the pandemic. Demand for workers in construction jobs remains high regardless.

Sector value

The Construction sector in Victoria is forecast to grow by **2.2%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, Deloitte Access Economics forecast.¹
 ^The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment

Construction is well represented by the ANZSIC[^] *Construction* industry, which remains a steadily growing source of employment in Victoria. The significant pipeline of government infrastructure projects coupled with supply chain shortages is contributing to high vacancy rates in construction jobs.

365,000
in 2024

Total Victorian employment in Construction

374,000
predicted by 2028²



\$22 billion

Contribution of construction industry to the Victorian economy³



\$520+ million

Economic contribution of Aboriginal businesses to the national construction sector⁴



18

Construction aligned occupations on the Jobs and Skills Australia shortage list⁵

Sector composition

Key subsectors



Residential and non-residential building construction



Heavy and civil engineering construction (incl road and bridge construction)



Land development and site preparation services



Building installation, completion, and construction services



Building structure services

Key occupations



Construction worker



Civil engineer



Carpenter



Safety manager



Project manager



Electrician



Ironworker



Architect

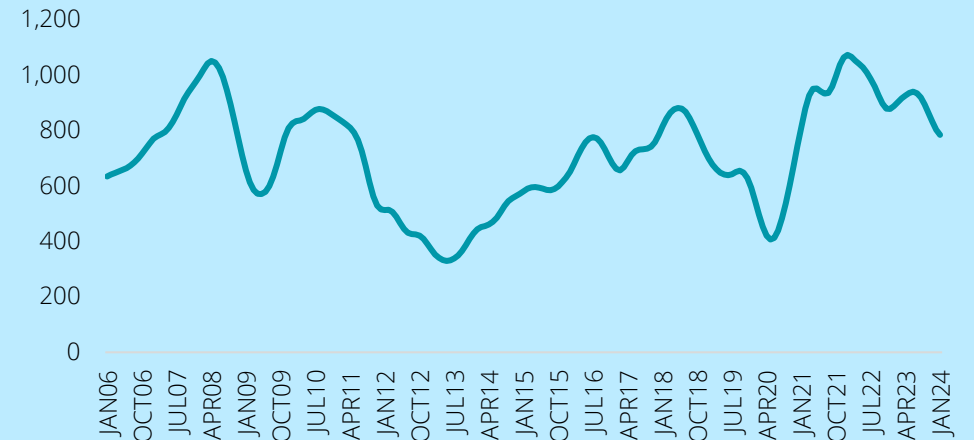


Plumber



Construction manager

Internet vacancies for Construction workers in Victoria⁶



*Construction workers include 1) Bricklayers, Carpenters and Joiners, 2) Floor Finishers and Painters, 3) Glaziers, Plasterers and Tilers, 4) Plumbers

Construction | Insights

Construction performed strongly on economic indicators in a multi-criteria analysis of growth industries for Aboriginal employment and businesses, driven largely by high existing capability within the sector. Growth of the sector is projected to be more mixed as reflected in the economic prospects rating.

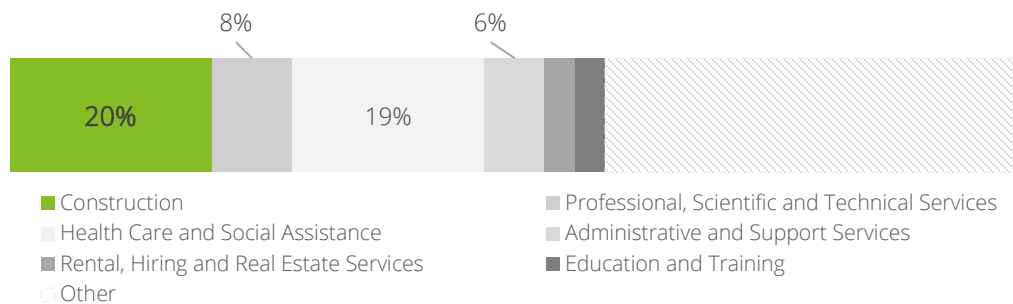


Economic prospects

Victoria's construction sector contributes \$21.6 billion to the Victorian economy.¹ While there are forces driving the potential for strong growth of the construction sector (for example, surge in demand for housing, government spending) the flow on effects of supply chain blockages from the pandemic continue to affect sector activity. Consequently, while some sub-industries are expected to experience unprecedented growth (residential housing), others will likely continue to contract or decline (recreation/large-scale facilities).² The construction sector is affected by the changing costs of materials required for projects and consumer affordability of services. Additionally, there is significant existing competition in the construction sector from firms who have longstanding relationships and successful delivery stories to support their market offering.

In a report published by PwC's Aboriginal Consulting practice using 2016 Census data, the Construction industry was found to be the first-choice sector for Aboriginal sole traders and enterprises to establish operations. The report found that Aboriginal sole traders and enterprises contributed upwards of \$520 million to national GDP.³

Composition of Aboriginal businesses by gross income generated, 2018-19⁴



Existing Capability

11.5% of Aboriginal employees in Victoria work in construction. This proportion exceeds Aboriginal workers nation-wide working in *Construction* (10.0%), and Victorian non-Aboriginal workers in construction (9.4%). This higher share indicates an overrepresentation of Aboriginal capability in this sector.

Sector share of Aboriginal Victorian employment
11.5%

Non-Aboriginal Victorians:
9.4%

Aboriginal Australians:
10.0%

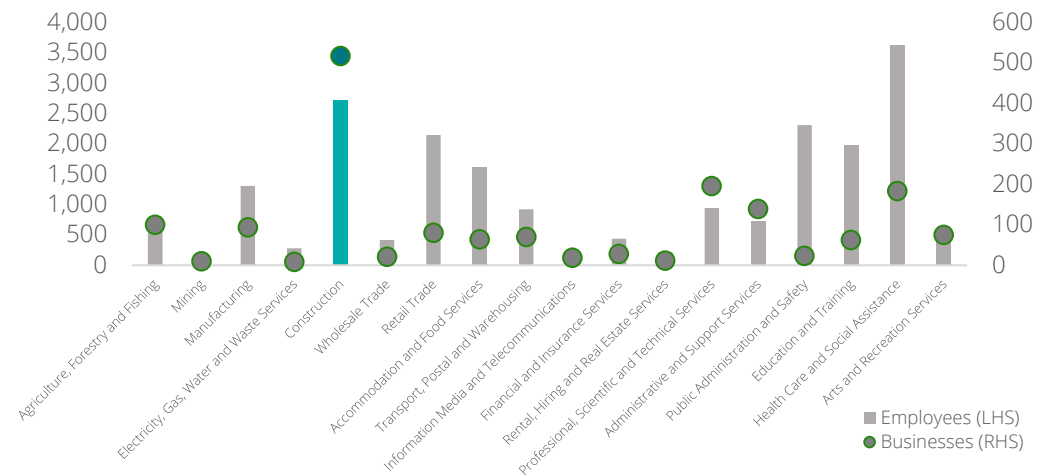
Aboriginal employees represent 0.9% of the *Construction* workforce in Victoria, which equates to the Aboriginal population as a proportion of the total Victorian population (0.9%).

Aboriginal share of Victorian sector employment
0.9%

Aboriginal share of Victorian population:
0.9%

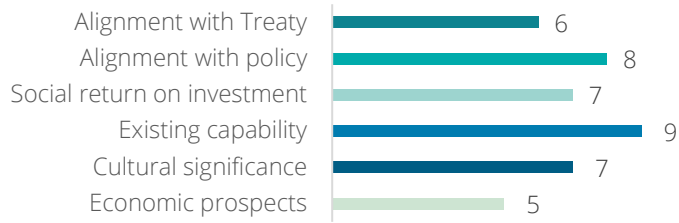
The construction industry has, by far, the largest volume of Aboriginal businesses relative to any other industry, as well as a significant level of Aboriginal employment.

Aboriginal employment and businesses by industry, Victoria, 2021⁵



Construction | Insights

The Construction sector is able to deliver social benefits to community through design that incorporates Aboriginal principles and voices. Aboriginal businesses and communities are also expected to benefit from government contracts and projects related to infrastructure in Aboriginal communities.



Social return on investment

With greater Aboriginal representation in the *Construction* sector, the design and construction of buildings may have culture at the centre which will make Aboriginal people living in a region feel safe and more included. Additionally, if Aboriginal people could oversee the reliable and high-quality construction of their houses and spaces, the community could ensure infrastructure is more fit for purpose, with potential flow-on effects for housing insecurity.¹

Construction is an area where Aboriginal consultation can create benefit to the community in terms of innovative designs, cultural experiences and improving sustainability in construction.

Example: The impact of Aboriginal voices in design

Aboriginal design caters for the practical implementation of cultural values and practices. When designing a community hub in Western Australia, the Gija elders identified a number of important cultural considerations. “Gender separation was one of the first principles in this community,” says Iredale Pedersen Hook director Finn Pedersen, a design feature to consider womens’ and mens’ business. As a result, two swooping wings encompass the structure, which is raised on stilts above the 2011 flood level, connecting at one end and traced with sweeping walkways.

“The building reflects the importance of this need for separate spaces, while creating a communal space in the middle that acts as a community hub with fire pits, where they can come together to celebrate lore and culture,” Pedersen adds.²

Alignment with policy

Infrastructure projects are often carried out through government contracts. Through these contracts, Aboriginal-owned construction companies can play a significant role in both the development and upkeep of infrastructure projects, especially those situated on Aboriginal lands.³

The Australian Government has committed to funding a number of infrastructure projects that will uplift the quality of life for Aboriginal Australians nationally as part of the journey towards closing the gap. Examples of this include the \$150 million commitment towards crucial water security projects in regional and remote Aboriginal communities and the progress towards enabling and empowering Aboriginal communities to play a key and central role in Australia’s renewable energy transition via policy, community consultation, partnerships, sponsorships and education programs.^{4,5,6,7}

In the October 2022 Budget, the Federal Government announced \$164.3 million for 17 Aboriginal health infrastructure projects across the country in areas of large and growing Aboriginal populations.⁸

Policy example: Construction grants

As part of the *First People’s - State Relations* strategy, the Victorian Government has committed to offering a range of grants, funding and training opportunities to Aboriginal Victorians in the construction space including funding of up to \$1.6m under an ‘Aboriginal Community Infrastructure Program.’⁹

Construction | Insights

There is huge potential to better adopt Aboriginal principles in construction, with significant cultural benefits. Treaty is also expected to improve business opportunities for Aboriginal construction companies through government contracts.

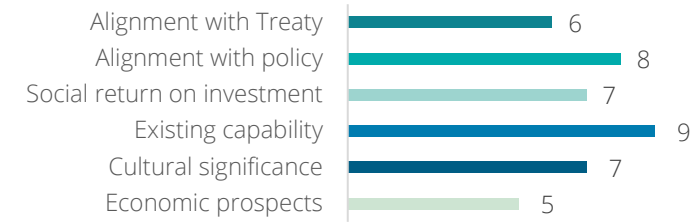
Cultural significance

Victoria's Aboriginal peoples were this land's first infrastructure builders. The Aboriginal traditional architecture was one branch of traditional Aboriginal ecological knowledge and wisdom. Despite variation in traditional architectural practices, Aboriginal peoples have undergone thousands of years of testing and experimentation. This knowledge contributed greatly to the maintenance of the diversity and abundance of ecosystems.¹

Materials used in traditional buildings were primarily derived from plant sources and were carefully selected based on the 'productivity' of the habitats of the region. The methods of construction were established through thousands of years of "learning by doing". They were based on respect and knowledge of the environment. Knowledge about the construction of traditional structures was conveyed orally and practically from Elders to the younger generation. For example, in mountain regions where the wind was strong, Elders would often teach the young how to choose the size and placement of materials, based on the knowledge of sun and wind, to build wind-resistant hunting sheds. This was often not simply a construction process but also a spiritual moment for Elders to pass on traditional teaching to the next generation. The traditional building itself contained knowledge and stored history. For many Aboriginal Peoples, buildings functioned both as utilitarian and sacred spiritual identities whereby ceremonies and knowledge were passed among generations.²

Across the country, housing and community institutions such as hospitals, clinics and courthouses have now been designed to cater for the functional and aesthetic needs of Anglo Australians, failing to meet the cultural needs of Aboriginal and Torres Strait Islander communities.

This gap in need both creates a demand for buildings that consider Aboriginal cultures and also for the variety of design as a unique market offering. Using these principles in modern infrastructure design principles is a low climate impact approach which will be supported by both policy and consumer demand as Victoria moves towards increasing environmental standards and challenges.



Alignment with Treaty

Infrastructure projects are often carried out through government contracts. Given that government contracts frequently drive infrastructure projects, Aboriginal-owned construction companies are expected to play a significant role in both the development and upkeep of infrastructure projects, especially those situated on Aboriginal lands.^{3,4,5,6,7}

Aboriginal business example: Wamarra
Wamarra* is an Aboriginal owned and operated Victorian based civil contractor with an aim of building high quality construction projects while strengthening Aboriginal participation and engagement within the construction sector.⁸

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4. Homes Victoria, 2023. [Homes for Aboriginal Victorians Round](#).
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2. [Angela Mashford-Pringle, Ruofan Fu, and Sterling Stutz, 2023. Mamwi Gidaanjitoomin/Together We Build It: A Systematic Review of Traditional Indigenous Building Structures in North America and Their Potential Application in Contemporary Designs to Promote Environment and Well-Being](#).
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5. Monash University, 2019. [MATTERS WITHIN VICTORIAN AUTHORITY](#)
6. First Peoples' Assembly of Victoria, 2024. [A Path to Treaty](#)
7. Waitangi Tribunal, 2024. [Meaning of the Treaty](#).
8. Wamarra, 2024. [The Wamarra mandate is unambiguous](#)

Native Medicine and Food Systems | Sector Overview

Interest in native medicines and food is growing with new products and applications being developed from Australia's diversity of native plant species. Supply is not keeping up with demand, providing significant opportunities for Aboriginal led businesses to join the sector.

Sector value

The Native Medicine and Food Systems sector in Victoria is forecast to grow by **2.6%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, Deloitte Access Economics and IBIS World forecasts for aligned industries.¹

^The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment

The Native Medicine and Food Systems sector draws from multiple industries and occupations. This report uses data from the ANZSIC[^] Agriculture, Accommodation and Food, Wholesale Trade, Retail Trade and Food and Beverage industries. The *Native bushfood and botanicals* industry data in this panel reflects applications in medicine, food as well as beauty and health.



\$153 million

Sales in Australian native bushfood and botanicals sector in 2019-20²



Only 13 of 6,500

Native plant species in Australia have yet been actively traded³



38%

Of native bushfoods producers rely on exports for more than half their sales⁴



< 2%

Estimate of share of Aboriginal businesses in native bushfoods and botanicals sector⁵

Sector composition

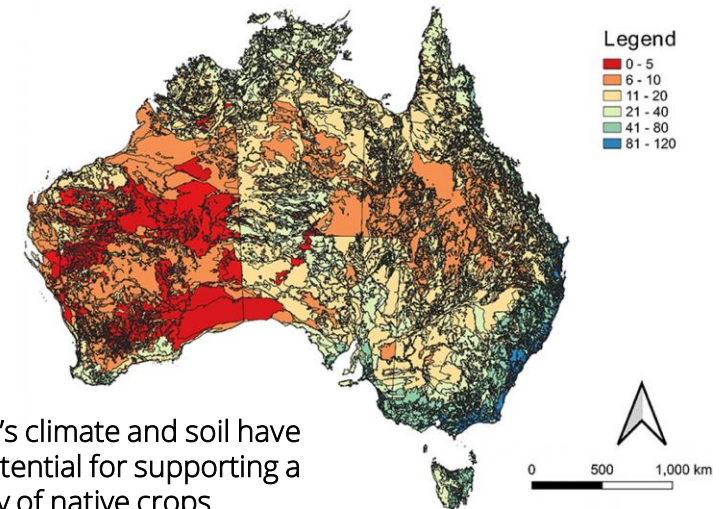
Key subsectors

- Scientific research services
- Agriculture support services
- Nursery and floriculture production
- Food retailing (including online)
- Product wholesaling
- Basic chemical and chemical product manufacturing
- Livestock, grain, crop, fruit and tree nut, mushroom and vegetable farming
- Food and beverage product manufacturing

Key occupations

- Environmental scientist
- Sustainability coordinator
- Veterinarian
- Agricultural manager
- Agricultural economist
- Retail salesperson
- Marketer
- Research technician
- Agricultural lawyer
- Herbalist
- Horticulturist
- Food technologist

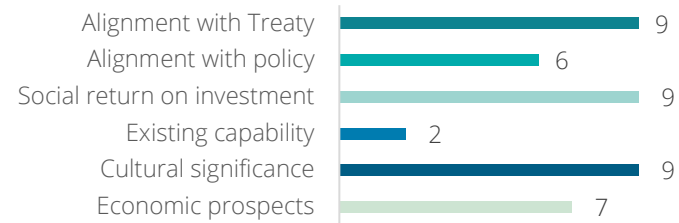
Suitability of 177 native food and forage species across Australia⁶



Victoria's climate and soil have high potential for supporting a diversity of native crops

Native Medicine and Food Systems | Insights

Native Medicine and Food Systems has moderate economic prospects and low existing capability compared to other industries considered in a multi-criteria analysis of growth industries for Aboriginal employment and businesses.



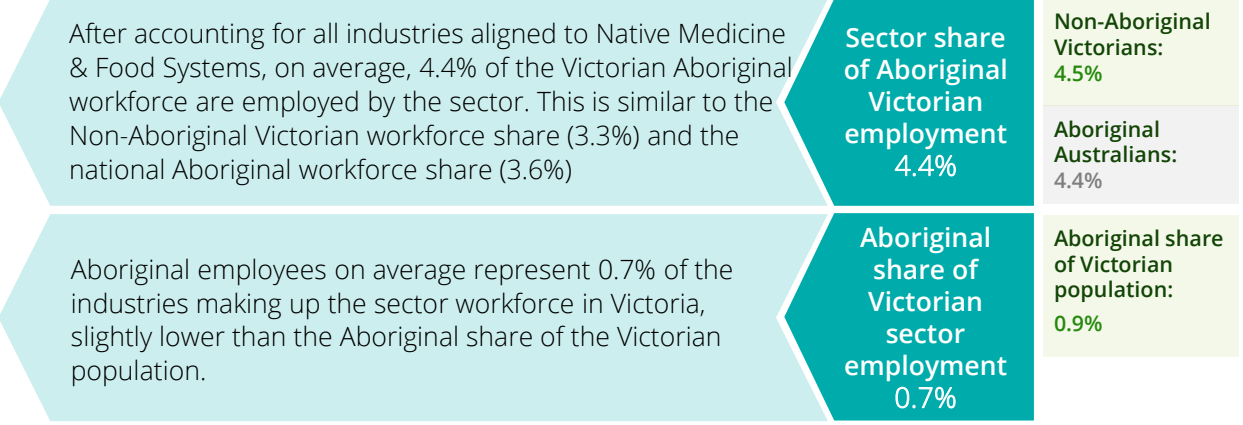
Economic prospects \$

Native Food
Sectors that make up the *Native Food Systems* sector in Victoria (agriculture, food, wholesale trade, and accommodation) are predicted to grow on average 2.3% across the next five years. This is supported by direct research on the growth prospects of native plant foods. A 2020 study estimated that the Australian native bushfood and botanicals industry created \$153 million in sales in 2019-20, with expectations that this would double by 2025.¹ Growth potential remains high considering that only 13 of at least 6,500 native plant species are actively traded, with further reports also noting that demand for existing products is higher than can be met by current supply.²

Native Medicine
The four industries combined that represent *Native Medicines* (agriculture, food, wholesale trade, and retail trade) are expected to grow between 2.0% and 2.5% each year over the next five years. IBIS World also predicts that Alternative Health Therapies will grow by 2.9% per year over the next five years, nationally (with around 10% of alternative health therapies related to herbal and traditional medicines).

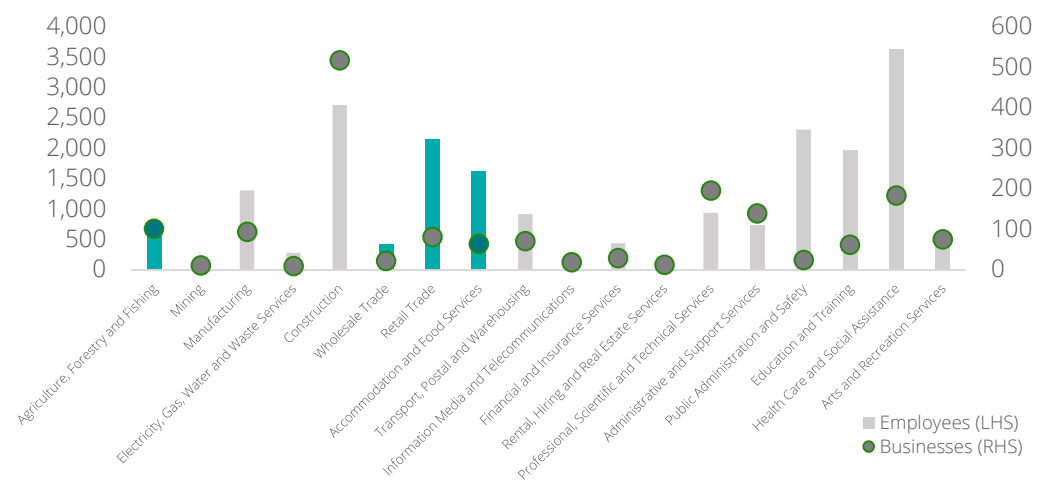
Opportunities and risks:
The performance of the agricultural industry that supports the Native Medicine and Food systems sector is highly impacted by changing climates, natural disasters and other environmental issues. Businesses in this sector should consider investing in either produce that is not climate vulnerable / sensitive or to invest in practices that are climate resilient. Innovative technology will be a key enabler to keep up to date with climate challenges. Notably, there are opportunities to enter carbon markets in parallel to food and medicine as wholistic farming practices and a number of native plants will sequester carbon in large amounts.

Existing Capability Ω

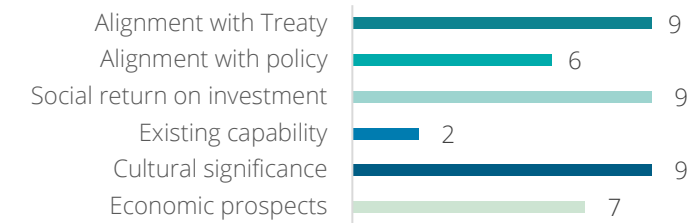


Industries that map to this sector employ and are home to a large volume of Aboriginal workers and businesses yet there is room for greater Aboriginal business representation.

Aboriginal employment and businesses by industry, Victoria, 2021³



Native Medicine and Food Systems | Insights



The significant social benefits of growing the Native Medicine and Food Systems relate primarily to the environment. There is some evidence of supportive policy for the sector, but also key risks such as biopiracy.

Social return on investment

Providing native ingredients to food and beverage brands, product developers and so on will likely have a compound effect in driving the demand for native ingredients. This in turn provides opportunities for farmers and harvesters to increase their production of native plants in traditional and low impact ways. These are often less impactful for the environment and can lessen the impacts of natural disasters.

Aboriginal people are expected to benefit from increased investment and employment in the native medicine industry. Higher levels of native medicine development could decrease costs and they may be further explored for new applications via modern scientific studies. Taking a holistic approach to health care is also seeing demand from consumers.¹

Environmental benefits of native plants:

Research has made clear the environmental benefits of cultivating Australian native plants over imported varieties that require heavy irrigation and lead to soil salinity and loss of habitat.

Given the current environmental crisis that is felt acutely in Australia through increased droughts, bush fires, severe loss of biodiversity, the poor state of Australian soils and climate change, farming and land management practices that are more regenerative and environmentally harmonious are sought after.²

Alignment with policy

Policy support for Native Medicine and Food Systems is reasonably strong, with a clear commitment to recognising and enhancing Traditional Owners' leadership in this emerging sector. The Traditional Owner Native Foods and Botanical Strategy has outlined reform of legislation, regulation, policy phasing, investment and co-capacity building in partnership with Traditional Owners as critical to enabling the development of a Traditional Owner led industry whereby strategic planning, investment and collaborative action, will be a catalyst for cultural, economic and environmental gain in Victoria.³

Grant programs for Aboriginal businesses and initiatives addressing cultural safety and educational priorities emphasise comprehensive policy support to the development and sustainability of native food enterprises.⁴

However, the healthcare policies and strategies implemented by the government do not promote the integration of traditional medicine into the broader healthcare system. Within the broader healthcare system there are many regulatory requirements and policies, often complex and costly, for operations during all stages of production and sales of products.⁵

Policy example: Djakitjuk Djanga

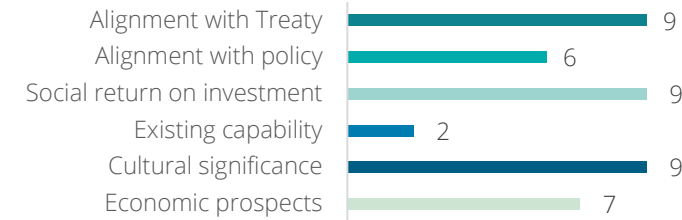
Djakitjuk Djanga (Country's food) is a program that is being delivered by the Federation in collaboration with Agriculture Victoria. Under Djakitjuk Djanga, grants of up to \$200,000 (excl GST) will be available to eligible Aboriginal businesses and organisations to help overcome key resource related barriers to commercially producing native plants for use as food and botanicals. Djakitjuk Djanga will also establish a Community of Practice to help progress Aboriginal leadership of Victoria's native food and botanicals industry.⁶

Sector risk: biopiracy

Protections against Aboriginal knowledge appropriation have increased slowly over the last 30 years. But biopiracy still exists with foreign entities patenting traditional crops and medicinal practices without consultation with Aboriginal peoples. A UNSW professor of environmental management is ensuring the benefits of products developed from local bushfood and medicine are fed back to Aboriginal peoples and local communities⁷.

Native Medicine and Food Systems | Insights

There is strong alignment with cultural significance and Treaty for the Native Medicine and Food Systems sector, driven by the foundational cultural knowledge required in this sector, and land management practices linked to the sector that will be underpinned by Treaty.



Cultural significance

Aboriginal people harvested and hunted a vast array of foodstuffs across Australia, taking advantage of seasonal plenty for consumption, ceremony and trade. The traditional knowledge of native species, growing techniques and uses for natives are a unique offering to the popular food and tourism industries within Victoria.

Aboriginal Ecological Knowledge is the foundation of Australia's native foods and botanicals industry. Present day practitioners of bush medicine offer a wealth of knowledge that can be used to improve our understanding of the process of healing.¹

Sub-sector example: Indigenous native flour

Deep rooted native perennial grasses are well known sequesters of soil carbon. They also form the original Aboriginal native grain system, a food source that has the potential to equitably stimulate regional economies and build resilience back into our national landscape; investment would be funding carbon sequestration, with innumerable natural, social, cultural benefits.²

Aboriginal business example: Warndu*

Warndu is an Aboriginal owned company that curates Australian Native Food Experiences. Warndu uses this country's native plants, nuts, seeds and proteins and each of these will create meaningful meals; meals that are local and seasonal in the true sense of words.³

Alignment with Treaty

Treaties in New Zealand and Canada included Traditional relationships with land and waters, economic underpinnings for caring for Country, land and water hand backs and entitlements and economic development opportunities.

Notably across international Treaty negotiations, there is also a strong emphasis on protection of Indigenous Cultural and Intellectual Property (ICIP) and the investment in systems, governance and remediation to do so. This is a key area of focus in the Native Medicine and Food Systems sector and is likely to be included within the Victorian Treaty negotiations to protect other multiple sectors alongside it.

This sector has not been specifically mentioned within the conversations surrounding Treaty and the Victorian landscape however the land management practices required in *Native Medicines* production are directly linked through *Caring for Country*.^{4,5,6,7,8}

Opportunities/risks for Aboriginal businesses

As part of the Treaty negotiations and expansion of application of cultural related services in Victorian sectors, Cultural Intellectual Property regulation and protection must be invested in. This should be a priority for any businesses entering into these sectors and the non-Aboriginal businesses working alongside them; many TO's may be more concerned about protecting ICIP rather than commercialising Native medicines and food products.

Native Medicine and Food Systems | References

Sector overview

1. This reflects the average of two key datasets:
 - Deloitte Access Economics forecast, Victoria: Agriculture, Forestry and Fishing (2.2%), Food, Beverage and Tobacco (2.4%), Wholesale Trade (2.5%), Accommodation and Food Services (2.4%), Retail Trade (2.0%)
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6. Monash University, 2019. [MATTERS WITHIN VICTORIAN AUTHORITY](#)
7. First Peoples' Assembly of Victoria, 2024. [A Path to Treaty](#)
8. Waitangi Tribunal, 2024. [Meaning of the Treaty.](#)

Education | Sector Overview

Education is a steadily growing sector, supported by a growing population and government investment. Victorian schools face severe teacher shortages and particularly struggle in employing Aboriginal teachers, while seeking to improve the cultural education taught in schools.

Sector value

The education sector in Victoria is forecast to grow by **2.6%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, Deloitte Access Economics and IBIS World forecasts for aligned industries.¹
^The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment

Education is aligned with the ANZSIC^ *Education and Training* industry, with a particular alignment to preschool and schooling sub-industries.

Victoria faces a teacher shortage crisis with significant recent growth in vacancies, and Aboriginal people make up a very small share of the teaching workforce.




8.4%

Share of workers in Education and Training in Australia²



306,000 in 2024

Total Victorian employment in Education and Training³



209

Aboriginal teachers in Victoria (2022)^{3,4}



1,494

Internet vacancies for Education professionals in Victoria⁵

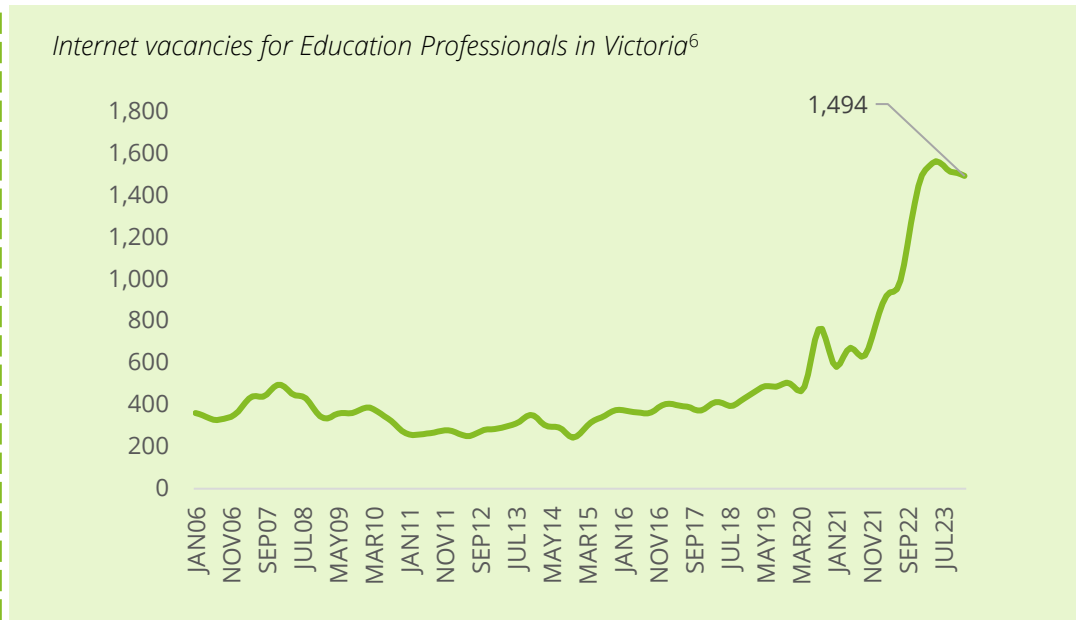
Sector composition

Key subsectors

- Preschool education
- School education
- Tertiary education
- Adult, community and other education
- Educational support services

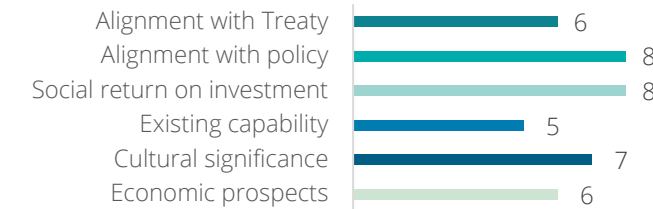
Key occupations

- Teaching assistant
- Curriculum developer
- Substitute teacher
- Lecturer
- Early childhood teacher
- Academic advisor
- Librarian
- Educational resource manufacturer
- Teacher



Education | Insights

Education performed modestly in terms of economic prospects and existing capability in a multi-criteria analysis of growth industries for Aboriginal employment and businesses.



Economic prospects \$

The education and training sector broadly is expected to experience high rates of growth over the next five years, largely a product of a growing population, heavy investments from governments, and initiatives to boost participation. The Victorian Government's dedication to instilling Aboriginal cultural competency within the State's education system will further contribute to economic prospects of the sector and the Aboriginal workforce more generally.¹

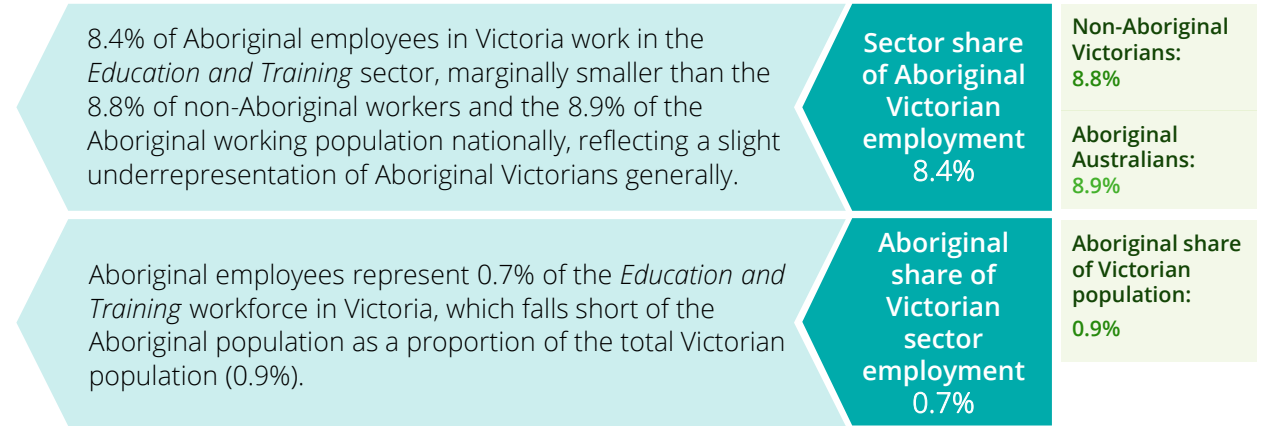
Existing Capability Ω

The *Education and Training* industry exhibits high volumes of Aboriginal employment but room for growth in the number of Aboriginal owned businesses within the industry.

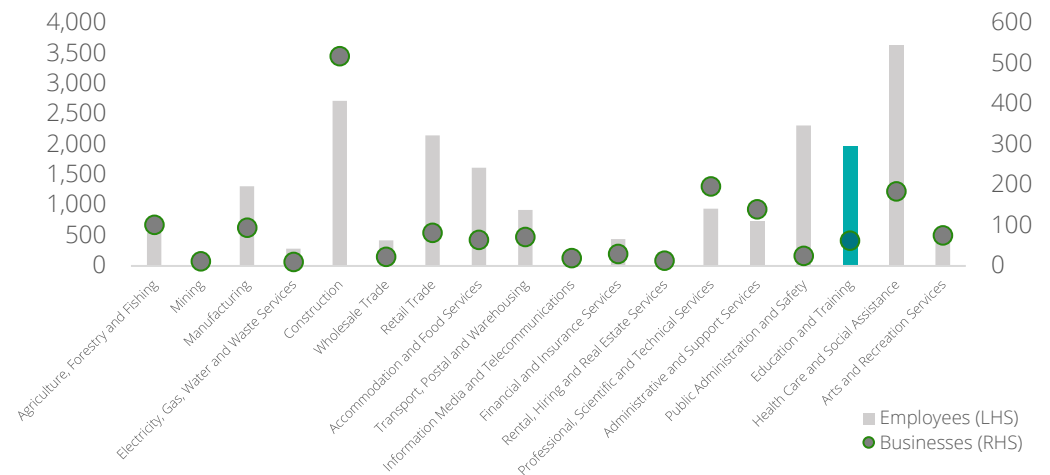
The Victorian government reported that the number of education workers who identify as Aboriginal people has fallen between 2021 and 2022 from 247 to 209 people. However, this total remains higher than pre-pandemic levels.²

The Victorian Government has also made heavy investments into cultural education for Victorian school staff. It reported that the proportion of schools that undertook Community Understanding and Safety Training for its staff had doubled to 280 campuses in 2021 compared to 2020, reflecting a surge in the demand for cultural competency in the teacher workforce.³

The government has also developed a Koorie Education Coordinator and Koorie Engagement Support Officer initiative which contributes to existing capability within the sector by engaging area-based professionals with an understanding of culture and community to advise schools and educational institutions.⁴



Aboriginal employment and businesses by industry, Victoria, 2021⁵



Education | Insights

There is clear evidence of the social benefits of a greater Aboriginal presence in the Education sector, and this is supported by policy across the early childhood and schooling systems.

Social return on investment

Aboriginal and Torres Strait Islander educators play a significant role in the communities in which they live and work due to their deep understanding of the local context, languages, histories and cultures. The complex and interconnected components of their role relate to the essential elements of identity, well-being and belonging.¹

Education, health and community outcomes

A higher Aboriginal presence in school education is expected to improve cultural safety for Aboriginal children, supporting students in the key areas of learning, culture and community. Higher levels of education are associated with improved health outcomes through greater health literacy and better prospects for socioeconomic status, and also support increased access to safe and healthy housing. There are also positive, lifelong impacts for the whole community (for example, lower crime rates, and greater health outcomes).²

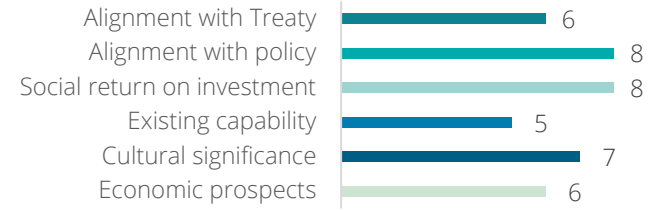
Intergenerational benefits

Aboriginal and Torres Strait Islander educators are also role models for students in their post-school transition and pathways. Aboriginal and Torres Strait Islander people who complete Year 12, or a higher qualification, are more likely to be employed, to work full-time, and have higher skilled jobs than early school leavers.³

There are also broader social benefits for all Aboriginal Victorians from all children in Victoria having a better understanding of Aboriginal culture and history.

Sub-group example: Rural and remote school education

Estimates suggest remote school principals find it nearly twice as difficult to fill staff vacancies, compared to principals at metropolitan secondary schools. This is even more difficult for schools in remote Aboriginal and Torres Strait Islander communities, where teachers frequently report feeling isolated while dealing with the 'always on' challenge of teaching and living in a bilingual and bicultural community. Aboriginal and Torres Strait Islander educators provide the stable presence for students in these learning environments.⁴



Alignment with policy

The Victorian Government acknowledges the significance of catering to the distinct needs and cultural considerations of Aboriginal individuals within the education system. This commitment is reflected in substantial investments and partnerships between schools and local Aboriginal communities to strengthen the teaching of Aboriginal histories, cultures, and perspectives.⁵

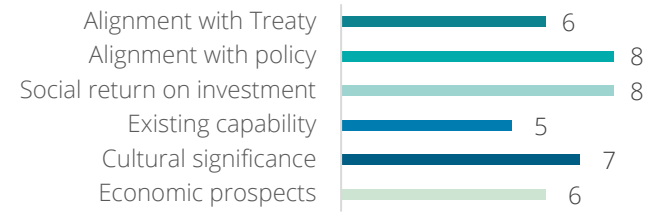
The Education State Early Childhood Reform Plan has set out the Victorian Government's vision for the early years which is supported by a record \$202.1 million investment. This will be implemented through delivering systemic change, targeted support to the children who need it most, to create a higher quality, more equitable and inclusive early childhood system that helps Victorian families get their kids ready for kinder, ready for school and ready for their lives ahead. The Government will continue to invest \$1.2 billion annually in the training and workforce development of Victorians, including supplementary funding for high needs learners and to support regional and specialist training.⁶

Victoria has worked with the Victorian Koorie community to develop the Marrung: Aboriginal Education Plan 2016–2026. Marrung sets out a 10 year vision and identifies the significant actions to make Victoria a state where the rich and thriving culture, knowledge and experience of our Aboriginal peoples are celebrated by all Victorians; where our universal service systems are inclusive, responsive and respectful of Koorie people at every stage of their learning and development journey; and where every Koorie person achieves their potential, succeeds in life, and feels strong in their cultural identity.⁷

The Victorian Budget 2022/23 has also invested in Victoria's Aboriginal cultural heritage system, with \$35.7 million to promote, protect and celebrate Victoria's invaluable Aboriginal cultural heritage. As part of the Labor Government's Marrung Education Plan to support Koorie students and embed Victoria's Aboriginal culture in the education system, \$2.8 million will establish a new Certificate IV-level course to build a new team of specialist teachers to revive language on Country and in classrooms and kindergartens.⁸

Education | Insights

The cultural significance of the Education sector is strong and there is potential to grow this with improved Aboriginal education. Treaty also provides opportunities for improved Aboriginal education, for example through curriculums.



Cultural significance

Education in Aboriginal communities is rooted in the tradition of passing down stories through art and the oral communication of truths across generations. This education encompasses culturally significant information, including lore, history, cultural practices, Aboriginal skills, and connection to the Country. Where appropriate and as permission is granted, Aboriginal education is an offering in school and formal education that is best taught by local Aboriginal people.

Aboriginal history and cultural education is a unique offering for Aboriginal people to provide to the Victorian education sector. Additionally, other subjects could be taught using Aboriginal principles and approaches (for example, learning about food production and preparation using native foods, doing art using local materials and techniques, learning languages of local Aboriginal communities, and teaching music using traditional instruments).¹

A way forward to support the outcomes of Aboriginal students and their engagement with school, is to begin the process of decolonising the classroom. Better quality Aboriginal education, staff and activities is therefore in the best interest of the Victorian and Federal Governments and the school system more widely and there is a market advantage for Aboriginal teachers and producers of education materials to fill this gap and support the movement toward decolonising the classroom.²

Aboriginal business example: Yarn Strong Sista (YSS)*
 Yarn Strong Sista (YSS) is a Victorian Aboriginal education consultancy service. Its services include tailored cross-cultural (Aboriginal) awareness programs for early childhood, storytelling and arts workshops with children (at kindergarten services) and professional development training for educators. It also provides Aboriginal-designed resources and educational tools.³

Alignment with Treaty

Jurisdiction recognised under each treaty typically includes family and social services and language and cultural education. While school is not directly mentioned here, these inclusions will likely affect the Education sector.

A Victorian treaty with Aboriginal people could result in the school curriculum being changed to include a more comprehensive view of Aboriginal history and centres to teach Aboriginal language established throughout the state, if suggestions raised in the first round of consultations are adopted. Significant work will be required to design and deliver a curriculum that is of high quality to create a trusted reputation for a new entrant and therefore a sustainable business offering.^{4,5,6,7,8,9}

Education | References

Sector overview

1. This reflects the average of two key datasets:
 - Deloitte Access Economics forecast, Victoria: Education and Training (3.0%)
 - IBIS World forecast, Australia: Preschool Education (2.3%), Government Schools (1.6%), Technical and Vocational Education and Training (3.2%), University and Other Higher Education (1.5%).
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3. Deloitte Access Economics forecasts
4. Victorian government First Peoples State Relations, 2022. [Victorian Government Aboriginal Affairs Report](#)
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3. National Indigenous Australians Agency, 2023. [Aboriginal and Torres Strait Islander Health Performance Framework](#)
4. National Indigenous Australians Agency, 2023. [Aboriginal and Torres Strait Islander Health Performance Framework](#)
5. Premier of Victoria, 2022. [Supporting Treaty And Aboriginal Cultural Heritage](#).
6. Engage Victoria, 2023. [Aboriginal Self-Determination in Education](#)
7. The Education State and Victoria State Government, 2016. [Marrung Aboriginal Education Plan](#).
8. Department of Education, 2019. [National School Reform Agreement - Bilateral Agreement Report - Victoria - 2019](#)

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2. The Conversation, 2022. [‘Decolonising’ classrooms could help keep First Nations kids in school and away from police](#).
3. Victoria State Government, 2024. [Yarn Strong Sista Aboriginal Support Packages](#)
4. First Peoples’ Assembly of Victoria, 2024. [Empowering Traditional Owners](#).
5. Castan, & Gerber. 2021. [Critical Perspectives on Human Rights Law in Australia Vol 1](#)
6. Monash University, 2019. [MATTERS WITHIN VICTORIAN AUTHORITY](#)
7. First Peoples’ Assembly of Victoria, 2024. [A Path to Treaty](#)
8. Waitangi Tribunal, 2024. [Meaning of the Treaty](#).
9. The Guardian, 2017. [Treaty with Aboriginal people could bring change in school curriculum](#).

Indigenous Consulting | Sector Overview

Consulting sits within the *Professional, Scientific and Technical Services* industry, which is the fourth largest employer in Victoria. Indigenous consulting is a growth area with demand from multiple industries, and expectations of higher demand following Treaty negotiations, which will require organisations to demonstrate engagement with Aboriginal communities.

Sector value




The Indigenous Consulting sector in Victoria is forecast to grow by **2.4%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, Deloitte Access Economics and IBIS World forecasts for aligned industries.¹

[^]The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment

Indigenous consulting services are increasingly in demand across multiple industries. This report primarily uses data from the ANZSIC[^] *Professional, Scientific and Technical Services* industry, noting that expertise is required across a variety of fields including architecture, advertising and law.

-  **9.3%** Share of workers in Professional, Scientific and Technical services ²
-  **355,000** in 2024 Total Victorian employment in Professional, Scientific and Technical services⁴
-  **196** Aboriginal businesses in Professional, Scientific and Technical services (2021)⁵

Sector composition

Key subsectors

-  Cultural advisory
-  Financial advisory services
-  Community engagement
-  Cultural heritage auditing

Key occupations

-  Consultant
-  Cultural advisor

Drivers of demand

-  Victorian Indigenous Procurement Policy
-  2023 Victoria Treaty Negotiations
-  Implementation of Reconciliation Action Plans

Indigenous Consulting | Insights

Indigenous Consulting has moderate economic and capability prospects compared to other industries considered in a multi-criteria analysis of growth industries for Aboriginal employment and businesses.



Economic prospects \$

The consulting sector is set to continue growing steadily.¹ Recent years have particularly seen a boom in the popularity of smaller, more specialised consultancies which can offer more nuanced advice, more direct lines of communication and greater agility when it comes to solving client problems.²

The value proposition of Aboriginal owned and operated consultancies is particularly strong across a number of sectors that are demanding Aboriginal expertise, for example in architecture and engineering where governments are increasingly requiring Aboriginal perspectives.³

Opportunities and risks:

The Indigenous Consulting sector, sitting within the wider consulting industry, is saturated and facing a challenging political landscape. This should be a consideration for new businesses entering into this market, as well as ways in which they can differentiate their offering to gain competitive advantage.

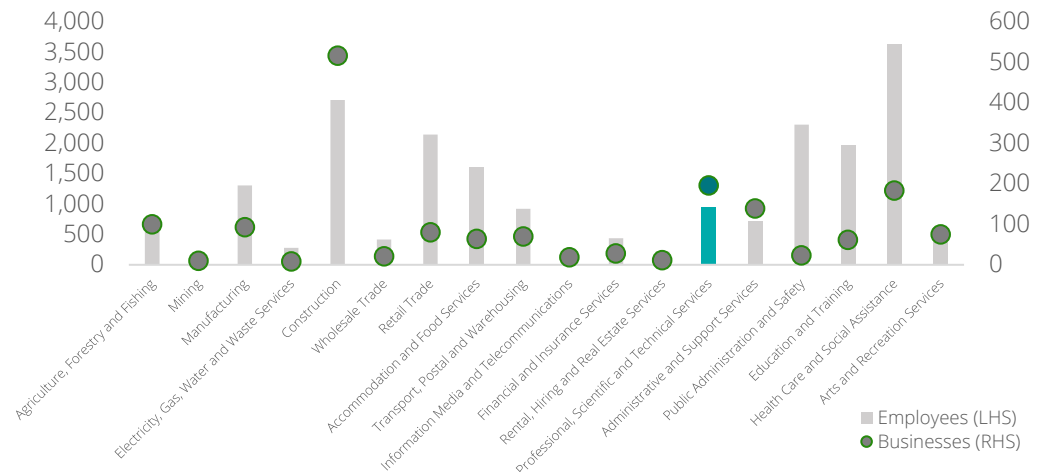
Existing Capability Ω

The supply of Aboriginal consultants is not currently keeping up with demand for Aboriginal expertise in consulting. For example, a director of a Melbourne-based architecture firm estimates that there are only around 20 registered Aboriginal architects nationally.⁴ This represents a significant opportunity to build Aboriginal capability in a range of consulting services to respond to rising demand for Aboriginal knowledge.

A high proportion of Aboriginal owned businesses in the professional services industry is also a promising indication for greater Aboriginal business and employment in the future.

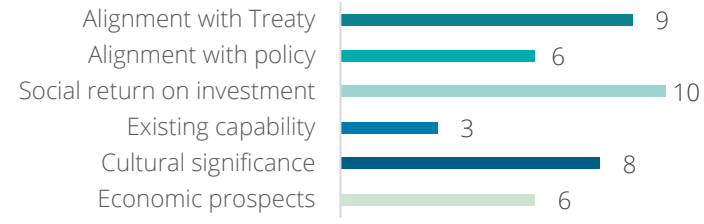


Aboriginal employment and businesses by industry, Victoria, 2021⁵



Indigenous Consulting | Insights

Indigenous Consulting has significant potential to improve social outcomes for Aboriginal communities by ensuring that Aboriginal voices are respectfully and meaningfully heard in policy design and other contexts. There is also strong policy support for Indigenous consulting services expected through Treaty.



Social return on investment

Aboriginal businesses in this space will provide greater advocacy for initiatives that are informed by community needs. Solutions designed by Aboriginal consultants are timely, involve community / stakeholder co-design, are often global best practice as well as commercially sound.

As they work together, government and communities trust each other as genuine partners. Often the best ways to engage Aboriginal communities is through Aboriginal Consultants who can ensure cultural sensitivities and needs are considered, that community is not over-consulted and that the approach isn't continuing a legacy of trauma. Once these baseline standards are established, Aboriginal consultants are often more likely to be able to facilitate safe consultation and collaboration which enables for meaningful design, partnerships and problem solving.

The solutions made through authentic listening, partnerships and design are more effective for both parties in both the short and long term. This both minimises harmful impacts to communities and maximises social benefits for each community who is consulted.¹

Sub-sector example: Conservation and restoration

Enabling Aboriginal leadership in landscape conservation and restoration projects will result in a more just and equitable transition to a low carbon future, a key priority for the state and Federal Government. It's a focus on embedding Aboriginal Knowledge to ensure that projects are designed and implemented in ways that drive long-term, system-wide benefits and positive outcomes. This requires extensive Indigenous Consulting.²

Alignment with policy

The Victorian Indigenous Procurement Policy may increase the procurement of Aboriginal consulting services across several industries.

The forecast policy implications of the 2023 Treaty negotiations in Victoria will likely include obligations of businesses and government to consult with Aboriginal communities when making development / business decisions on matters that involve Aboriginal people.³

Indigenous Consulting directly supports the United Nations Declaration on the Rights of Aboriginal Peoples, which establishes a universal framework of minimum standards for the survival, dignity and well-being of the Aboriginal peoples of the world and elaborates on existing human rights standards and fundamental freedoms as they apply to Aboriginal peoples. Indigenous Consulting is an avenue for Aboriginal autonomy and Free, Prior and Informed Consent about matters that affect their lives, growth, protection of culture and continuation of history and connection to lore and heritage.⁴

Indigenous Consulting | Insights

While not a priority area of focus for Treaty, Indigenous Consulting will be important for the implementation of Treaty in Australia. Indigenous Consulting more broadly plays a significant cultural role by championing the voices of Aboriginal communities and connecting government/business to community.



Cultural significance

Indigenous consulting directly deals with matters of Aboriginal identity, connection to communities (to act as a conduit between government/business and the community) and at time culture (through immersions or cultural competency trainings). Through intricate knowledge of the needs of their communities, and Aboriginal problem solving and communication, Aboriginal consultancies have significant competitive advantage in these matters.

Additionally, Aboriginal principles like autonomy and self-determination, design and innovation, knowledge exchange and storytelling, and problem solving are used in consulting and may mean their services are not only high quality but also culturally safe.

When it comes to Aboriginal matters, effective and appropriate solutions cannot be made without Aboriginal voices at the forefront of design and decision-making processes. Often to make this happen, Indigenous Consulting is required to safely connect Aboriginal people with Governments and private sector clients. Aboriginal Consulting firms have competitive advantages due to their understanding of Aboriginal engagement approaches, existing relationships, understanding and interpreting Aboriginal unique challenges in ways that Government and private sector businesses can approach.¹

Alignment with Treaty

Indigenous Consulting has not been listed as a priority sector of focus for the Treaty negotiations however it is a key avenue by which the Treaty will be implemented within Victoria; whereby Aboriginal Consultants provide advisory roles, connect businesses with the Aboriginal people that are required to participate in decision making processes, and who can support governance / administrative activities.^{2,3,4,5,6}

Indigenous Consulting | References

Sector overview

1. This reflects the average of two key datasets:
 - Deloitte Access Economics forecast, Victoria: Professional, Scientific and Technical Services (3.2%).
 - IBIS World forecast, Australia: Architectural Services (2.0%), Market Research and Statistical Services (2.1%), Scientific Research Services (2.1%), Engineering Consulting (1.0%), Specialised Design Services (-0.1%), Environmental Science Services (1.5%), Legal Services (2.4%), Advertising Agencies (1.4%), Management Consulting (1.8%).
2. Australian Government, 2024. [Professional, Scientific and Technical Services](#)
3. Deloitte Access Economics forecasts
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2. Consultancy.com (2019) [Three reasons behind the rise of the specialist consultancy](#)
3. Australian Financial Review, 2023. [Shortage of Indigenous architects drags on building work](#).
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2. First Peoples' Assembly of Victoria, 2024. [Empowering Traditional Owners](#).
3. Castan, & Gerber. 2021. [Critical Perspectives on Human Rights Law in Australia Vol 1](#)
4. Monash University, 2019. [MATTERS WITHIN VICTORIAN AUTHORITY](#)
5. First Peoples' Assembly of Victoria, 2024. [A Path to Treaty](#)
6. Waitangi Tribunal, 2024. [Meaning of the Treaty](#).

Public Administration | Sector Overview

Public Administration is a large employer in Victoria, through the Victorian public service, Commonwealth and local governments, and other local public services such as defence and police. The Victorian public service is growing steadily in response to infrastructure projects and social policy initiatives, and other components of Public Administration are also showing steady growth.

Sector value

The Public Administration sector in Victoria is forecast to grow by **2.2%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, Deloitte Access Economics and IBIS World forecasts for aligned industries.¹

[^]The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment

Public administration encompasses multiple occupations within government. This report primarily uses data from the ANZSIC[^] *Public Administration and Safety* industry, which includes workers in the Federal Government, State Government, local government, as well as regulation, defence, justice, fire protection services and correctional services.



6.5%

Share of workers in Public Administration and Safety, Australia²



174,000

Workers in Public Administration and Safety in Victoria (2024)³



2.1%

Increase in employment, Victorian public service, 2021-22⁴

478
in 2017

Aboriginal employees in Victorian public service

688
in 2022⁵

Sector composition

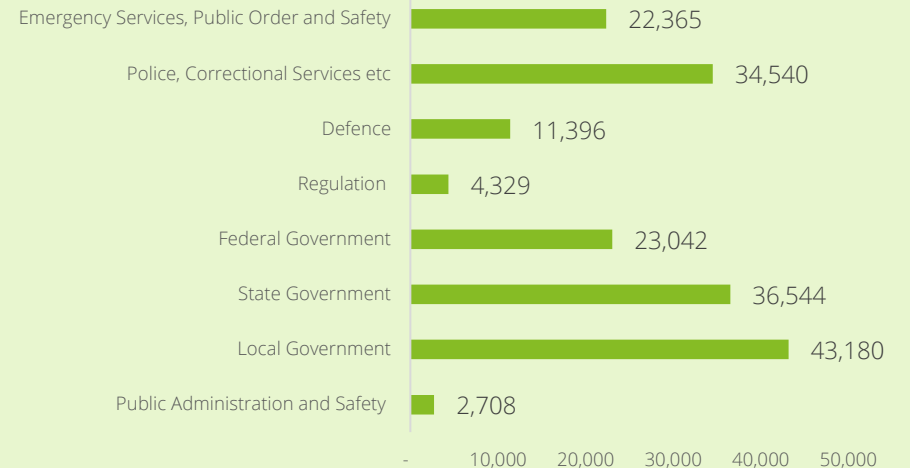
Key subsectors

- Correctional and detention services
- Defence
- Central, state and local government administration
- Justice
- Public order and safety services
- Fire protection and other emergency services

Key occupations

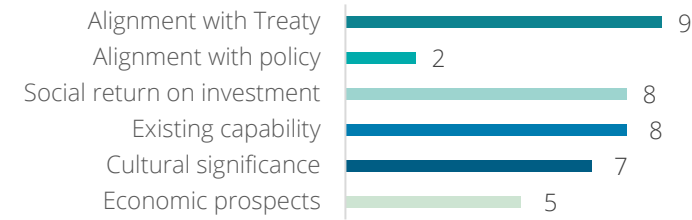
- State government officer
- Health and safety officer
- Police officer
- Youth justice worker
- Correctional officer
- Local government officer
- Firefighter
- Project manager

Breakdown of Victorian workers in the Public Administration industry (2021)⁶



Public Administration | Insights

Public Administration has strong existing capability and promising economic prospects, ranking highly particularly with respect to capability in a multi-criteria analysis of growth industries for Aboriginal employment and businesses. Public Administration is the third largest employing industry of Aboriginal workers in Victoria.



Economic prospects

Economic prospects of the public administration sector in the future are strong. High anticipated population growth and the associated uplift in GDP growth, coupled with a greater demand for emergency services, will lead to high growth and greater government investment into the sector.

Existing Capability

The Public Administration sector is responsible for employing a large portion of the working age population. Additionally, the Victorian Government has prioritised greater Aboriginal representation in the sector with initiatives such as the New First Peoples' Assembly and a 2% representation target enforced by the Victorian Public Sector Commission.¹ Pursuit of this target saw a rise in Aboriginal Victorian Public Servants from 478 in 2017 to 688 by 2022.² These forces are expected to positively affect existing and future capability of the Aboriginal workforce within the sector.

Approximately 1 in 10 (9.8%) of Aboriginal employees in Victoria work in the *Public Administration* industry, similar to the national context and almost double that of non-Aboriginal worker representation (5.6%), indicating a relative overrepresentation of Aboriginal capability.

Sector share of Aboriginal Victorian employment
9.8%

Non-Aboriginal Victorians:
5.6%

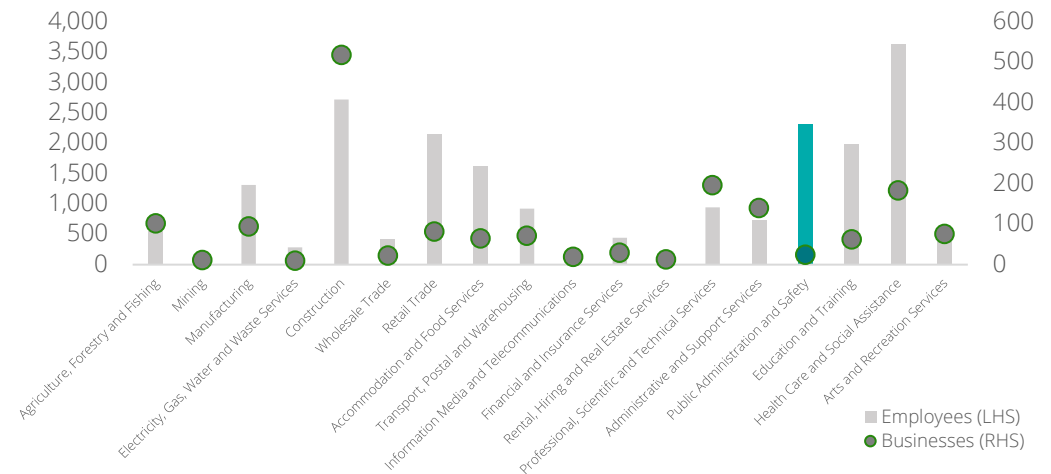
Aboriginal Australians:
10.2%

Aboriginal employees represent 1.3% of the *Public Administration* workforce in Victoria, which exceeds the total Aboriginal population as a proportion of the total Victorian population (0.9%).

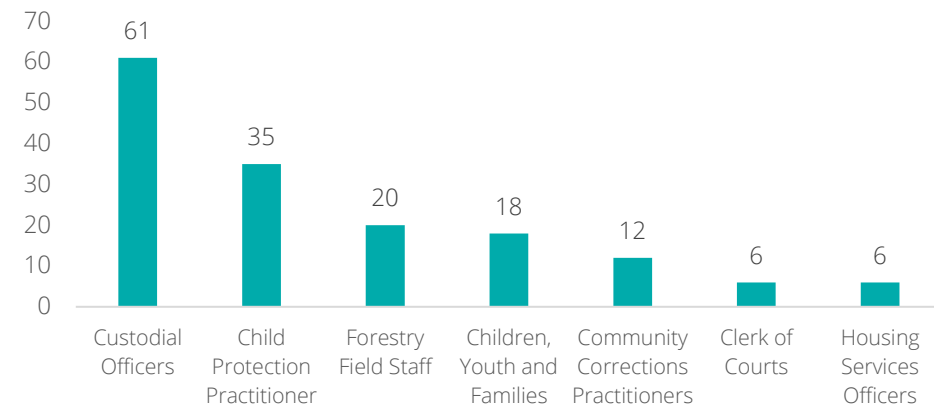
Aboriginal share of Victorian sector employment
1.3%

Aboriginal share of Victorian population:
0.9%

Aboriginal employment and businesses by industry, Victoria, 2021⁴

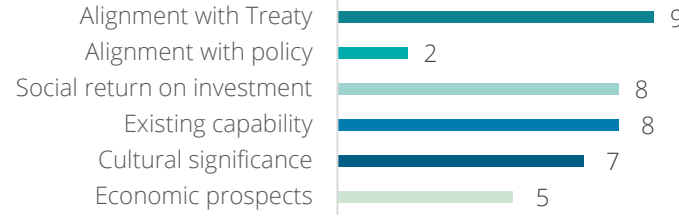


Aboriginal employees in the Victorian Public Service by Occupation Classification, 2022³



Public Administration | Insights

There is strong potential for increased Aboriginal presence in Public Administration to improve social outcomes for Aboriginal communities, through Aboriginal people designing and implementing initiatives for Aboriginal communities. Policy support outside of Victorian Public Sector employment targets is minimal.



Social return on investment

A greater Aboriginal presence in Public Administration, through employment particularly but also businesses, will provide greater advocacy for initiatives that are informed by community needs. Solutions are more likely to create improved outcomes for Aboriginal people if they are involved in the design process from the start and in a meaningful way.¹

Sub-sector example: Emergency services and disaster management
 Aboriginal involvement in emergency services promotes respectful working relationships between Aboriginal people and governments to develop equitable, reliable emergency services.

In Canada, Aboriginal people are 18 times more likely to be evacuated due to an emergency event than non-Aboriginal people, as geography plays a major role in the provision of emergency services for Aboriginal people, who are often affected by emergency events to a greater extent due to remoteness. Remoteness is similarly a key factor in Australia for Aboriginal people, and safe consultation with communities is therefore needed to gather key information and obtain Aboriginal-specific contexts regarding home natural disaster risks, management and evacuation plans and proactive support services.

Alignment with policy

Support exists in the form of Victorian Public Sector Commission targets for Aboriginal representation (see previous page).

However, beyond this, there is limited clear evidence of policy support particularly for Aboriginal businesses in Public Administration. However, as Aboriginal Victorians gain greater self-determination, it is reasonable to anticipate increased government involvement of Aboriginal businesses and organisations in managing their own affairs.

The Sendai Framework for Disaster Risk Reduction 2015-2030 is an example of proactive and wholistic policy in Australia and a similar opportunity may be considered in Victoria. The framework advocates for incorporating Aboriginal knowledges and practices to complement scientific knowledge for effective and inclusive emergency and disaster management. Such traditional and local knowledge is an important contribution to developing strategies, policies and plans tailored to local contexts. A comprehensive search of publicly available local disaster management plans and subplans in selected local government areas was undertaken. Eighty-two plans were identified as well as 9 subplans from a list of Aboriginal communities and associated local government areas. This study found a wide disparity in the organisation, presentation and implementation of knowledges and practices of local communities. To reflect the priorities of the Sendai Framework, better consultation with local communities and leaders at all levels of government needs to occur and subplans need to be easily available for review by policy analysts and academics.³

Sub-sector example: Barring Djinang
 Barring Djinang is the 5-year Aboriginal employment strategy for the Victorian public sector. Aboriginal employees bring unique knowledge, skills and expertise to the workforce and understand the needs and aspirations of the Aboriginal community.⁴



Public Administration | Insights

Treaty will require Aboriginal people in design and implementation, highlighting the cultural importance of Aboriginal engagement in Public Administration.

Cultural significance

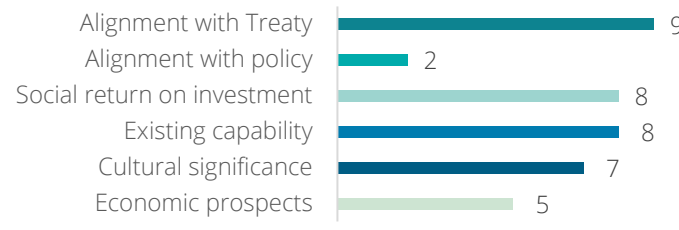
Aboriginal people, pre-colonisation, had sovereign countries and complex leadership and governance systems both internally and between mobs. These systems often performed similar roles to those existing today in Victoria. Post colonisation, Aboriginal people have been disproportionately mistreated and marginalised due to the justice, law, and political industries, but through Treaty will be given opportunity for increased public administration.¹

Sub-sector example: Disaster management

After two centuries of being removed from their lands, and therefore unable to practice it, Aboriginal-led organisations are bringing traditional fire management back to Country. Cultural burning is one well understood example of a Aboriginal practice that is shown to lower the risks of catastrophic wildfires. As natural disaster risks increase, Governments will be increasing investment in preventative measures so businesses and entities with knowledge of safe, effective and proactive natural disaster mitigation strategies across Australia will have market advantages.²

Sub-sector example: Defence

The defence sector presents a huge opportunity for Aboriginal participation, including Aboriginal entrepreneurship. At large this is of the Indigenous Procurement Policy (IPP) in Defence. Defence contracts represented a staggering 60% of all new government contracts awarded to Aboriginal businesses between 2020-21. Noting there's scope to refine the policy, and boost quality alongside volume, Defence contracts to Aboriginal businesses were worth \$610 million in 2020-21 (target: \$110 million).³



Alignment with Treaty

The jurisdictions recognised under each treaty typically include the administration of justice and family services. Public administration will be a key aspect of the Victorian Treaty and will take a number of forms during implementation depending on the subject matter.^{4,5,6,7,8}

Risk for Aboriginal presence in the sector: Cultural safety

Due to the significant increase of participation in the Public Administration sector, Aboriginal people should consider the risks of being exposed to public scrutiny. Additionally other roles within this sector can expose participants to unsafe cultural environments or risk their personal safety.

Particular care should also be taken to avoid exacerbating existing burn out of Aboriginal leaders that's been felt in the midst of the Voice to Parliament campaign and the Victorian Treaty negotiations during consultation required for advisory roles that seek to correctly represent the views of the community.

Public Administration | References

Sector overview

1. This reflects the average of two key datasets:
 - Deloitte Access Economics forecast, Victoria: Public Administration and Safety (2.2%)
 - IBIS World forecast, Australia: Police and Firefighting Services (1.4%), Local Government Administration (2.5%), State Government Administration (2.2%), Correctional and Detention Services (2.5%).
2. Australian Government, 2024. [Public Administration and Safety](#)
3. Deloitte Access Economics forecasts
4. Victorian Public Sector Commission, 2024. [Employee numbers](#)
5. Victorian Public Sector Commission, 2024. [Employee numbers](#)
6. ABS Census data

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2. Victorian Public Sector Commission, Apr 2023. [Aboriginal and/or Torres Strait Islander employees](#)
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4. First Peoples' Assembly of Victoria, 2024. [Empowering Traditional Owners.](#)
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Clean Energy | Sector Overview

Australian's transition to net-zero and the Victorian Government's ambitious renewable energy targets are fuelling growth in the Clean Energy sector, with the renewable share of energy generation in Victoria expected to rise from 34% in 2021/22, to 65% by 2030 and 95% by 2035. This is creating strong demand for skilled energy workers, underpinned by the *Victorian Clean Economy Workforce Development Strategy*.

Sector value

The Clean Energy sector in Victoria is forecast to grow by **2.1%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, IBIS World forecasts for aligned industries.¹
[^]The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment

Clean Energy is a rapidly growing sector that draws workers from the ANZSIC[^] *Electricity, Gas, Water and Waste Services* industry. This report also uses data on solar, wind and other renewable electricity generation sources that are growth areas for the Victorian energy sector.



43,000

Workers in Electricity, Gas, Water and Waste Services in Victoria²

12%

in 2013/14

Renewables share of electricity generation in Victoria

34%

2021/22³



10,000

Additional jobs each year till 2030 from meeting Victoria's renewable energy targets⁴



\$9.5 billion

Higher Victorian Gross State Product between 2023-35 from meeting Victoria's renewable energy targets⁵

Sector composition

Key subsectors



Clean Energy infrastructure



Community consultation and education



Innovation and scientific research



Electricity generation, transmission, distribution and market operations



Project management

Key occupations



Environmental scientist



Electrician



Renewable energy designer



Energy analyst



Community consultant



Wind turbine technician



Mechanical engineer



Solar installer

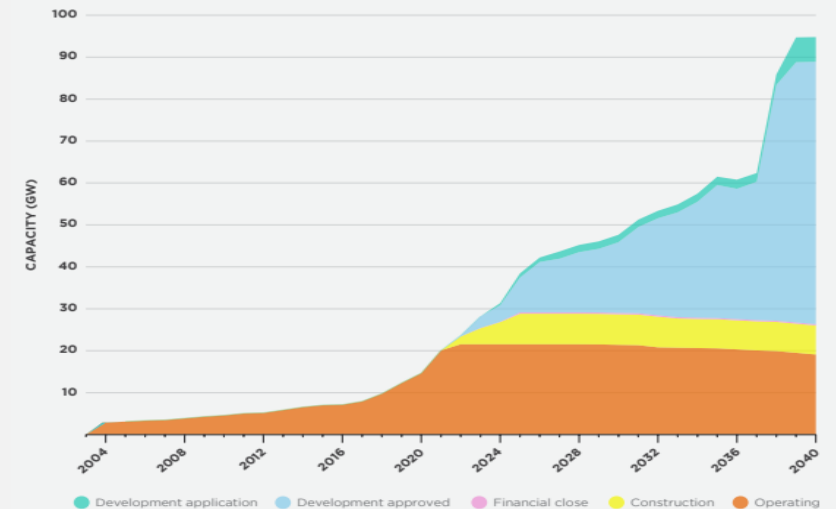


Hydro technician



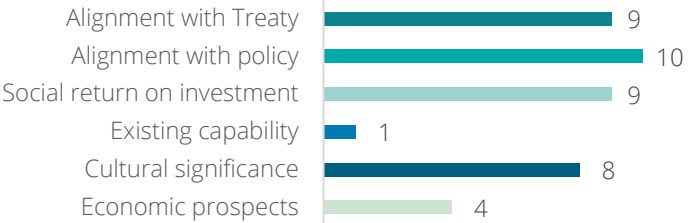
Engineer

Projected utility-scale clean energy project growth, Australia, 2021-40⁶



Clean Energy | Insights

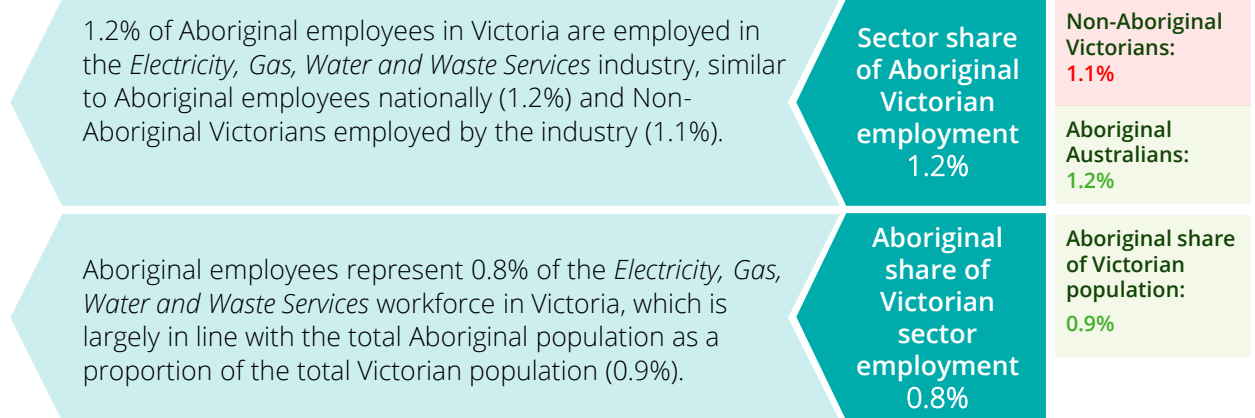
Clean Energy does not have strong economic and capability prospects compared to other industries considered in a multi-criteria analysis of growth industries for Aboriginal employment and businesses. However, this analysis largely uses data from the *Electricity, Gas, Water and Waste Services* industry, and there is strong potential to upskill Aboriginal employees from other industries in the transition to a more sustainable economy.



Economic prospects \$

Strong growth is expected in the national solar electricity generation sector (3.6%), with slower but still positive growth in wind generation over the next five years.¹ The Victorian Government's renewable energy targets will see continued investment in energy generation and storage infrastructure, supporting the growth of the clean energy sector.²

Using input-output modelling (I-O), it was found that accelerating the energy transition to achieve 95% renewable energy supply in Victoria by 2035 would add about \$9.5 billion to GSP on a gross basis and generate an additional 59,214 jobs over that horizon.³

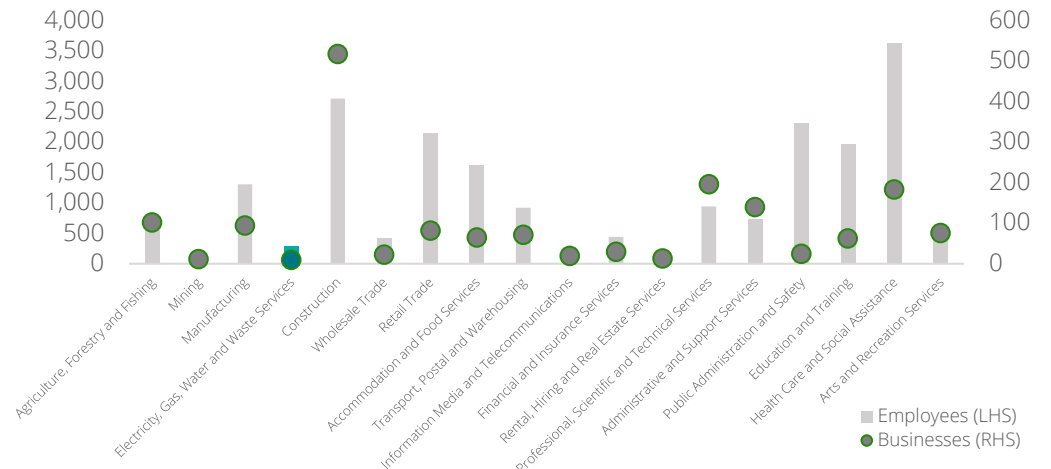


Existing Capability Ω

The Clean Energy sector is likely to draw workers from the *Electricity, Gas, Water and Waste Services* industry, which has very low Aboriginal employment and business representation at present.

However, the *Victorian Clean Economy Workforce Development Strategy* notes that rising demand for skilled energy workers provides an opportunity for greater workforce inclusion including for Aboriginal peoples.⁴ The emerging trend of governments and businesses consulting with Aboriginal communities on appropriate land management and sustainable energy generation also holds the potential for greater representation of Aboriginal people in the clean energy sector.⁵

Aboriginal employment and businesses by industry, Victoria, 2021⁶



Clean Energy | Insights

Clean Energy has strong social return potential, with clear environmental benefits as well as opportunities for cultural, social and financial benefits for Aboriginal communities. There is also significant policy support at Federal and state levels for the growing Clean Energy sector.

Social return on investment

Social outcomes related to a greater Aboriginal presence in the Clean Energy relate to having autonomy over access to reliable electricity, decreased reliance on diesel engines (which is a particularly disproportionate challenge in regional and remote communities) which create health problems and are often unreliable, and decreased reliance on pre-paid metres which are unreliable and often lead to communities not having access to energy for large periods of time.¹

Access to clean energy can also help Aboriginal people protect their culture and heritage and remain / spend more time on Country. *Bushlight* was part of Australia's early efforts to build its renewable energy sector, operating with a dual mandate of decarbonisation and community development in Aboriginal Homelands communities and findings from this project have important implications for decolonisation, supporting Aboriginal people to live on and care for Country while retaining their right to essential services.^{2,3}

Aboriginal business example: Wujal Wujek

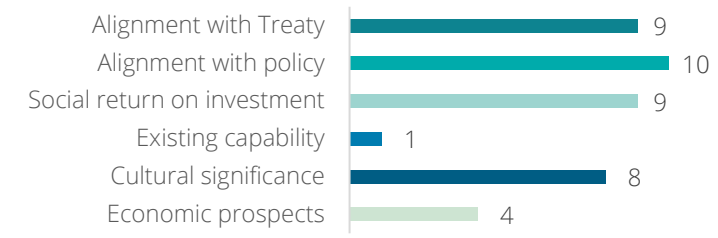
In early February 2024, the Premier of Queensland committed that the Wujal Wujek community's 40-year vision for a hydroelectric asset into a solid business case in 2022 would be inserted into the government's Wujal Wujek recovery budget.

One community member says the Premier's commitment may be an indication the government sees the link between Aboriginal energy resilience and disaster relief.

"First Nations people are identifying renewable energy solutions needed in homes and communities that are shaped around country and local weather events, to positively impact families, with benefits going back to our communities."

"Supporting Wujal Wujek's initiative to plan, build, operate and own clean energy and storage will lead to improved economic development, energy independence and productivity, and climate resilience, including environmental and health outcomes."

*"If the government stands by its commitment to Kathleen, the community could start building the solar and battery system which would keep the power on in case of future disaster events."*⁴



Alignment with policy

The Victorian Clean Energy sector is supported by strong and numerous state and Federal policies, including the *Victorian Clean Economy Workforce Development Strategy*; a 10-year planning and investment framework to prepare the state's workforce for a net zero future. It provides a foundation for the training pathways needed to meet the growing demand for skills as Victoria moves towards net-zero emissions by 2045.⁵

Additionally, the Renewable Energy (Jobs and Investment) Act 2017 supports a target of 25% renewable energy generation by 2020 and 40% by 2025. In 2018, the Victorian Government announced a commitment to increasing the target to 50% by 2030.⁶ This transition is further supported by the Victorian Government's Renewable Energy Action Plan; a \$146 million comprehensive and integrated strategy developed over many months, incorporating significant stakeholder engagement.⁷

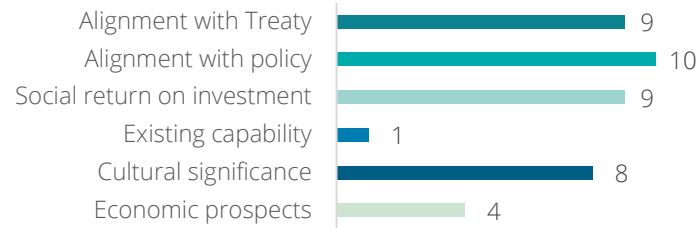
The Aboriginal *Clean Energy* sector also is actively supported by state policies, which include grants and capacity-building initiatives. Aboriginal *Clean Energy* is a major focus of the Federal Government's National Energy Transformation Partnership and National Roadmap for Indigenous Skills, Jobs, and Wealth Creation.^{8,9}

Risk for Aboriginal presence in the sector: Crown land ownership rights

During the transition to Clean Energy, every new solar farm or wind farm will require development assessment and approval. Under planning laws which operate throughout the country, the Crown retains certain rights to land even when supposedly 'absolute' ownership is granted to other parties. The Crown always retains ownership of development rights on land. These rights do not automatically attach to freehold or most other forms of land title granted across Australian jurisdictions. Rather, they must be secured through the planning system and the Crown may give or withhold development permission at its absolute discretion, including for new renewable energy infrastructure. There is an argument that those new development rights also rest with Traditional Owners of the land, and they should be factored into the decision making.^{10,11,12}

Clean Energy | Insights

Clean Energy has potential for strong cultural significance given the connection to land and water, with similar reasonings for the strong performance against alignment with Treaty.



Cultural significance

There is significant land and water use required for the growth of the *Clean Energy* sector and as such, its management closely aligns to the values of TOCs via strong cultural connection to Country and place. Aboriginal businesses who understand the land and have access to large areas of it will be at a market advantage in the *Clean Energy* sector.¹

Aboriginal presence example: First Nations Clean Energy Network (FNCEN)

The FNCEN are a network of Aboriginal people, community organisations, land councils, unions, academics, industry groups, technical advisors, legal experts, renewables companies and others, working in partnership to ensure that Aboriginal communities share in the benefits of the clean energy boom. They are guided by a powerful Steering Group of cultural leaders who are specialists from the clean energy sector, law, investment, academia, unions, business and community sectors.²

Alignment with Treaty

Treaties in New Zealand and Canada have specifically mentioned traditional relationships with land and waters, economic underpinnings for caring for Country, Land and water hand backs and entitlements, Economic development opportunities; all areas involved with *Clean Energy* Infrastructure projects.^{3,4,5,6,7,8}

Clean Energy | References

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Area of Interest - Aquaculture | Sector Overview

The Aquaculture sector in Australia grew to \$2 billion at the end of pandemic, with higher prices supported by supply chain issues. Growth is expected to slow as the sector adjusts from the volatile pandemic years and with slowing domestic and overseas demand. However, locally, the Victorian Government's support for the sector through the *Victorian Fisheries Authority's Aquaculture Strategy* is promising for new businesses.

Sector value

The Aquaculture sector in Victoria is forecast to grow by **1.3%** per year from 2024 to 2028*

*Compound annual growth rate, Gross Value Added, Deloitte Access Economics and IBIS World forecasts for aligned industries.¹
¹The Australian and New Zealand Standard Industrial Classification (ANZSIC).

Employment

The Aquaculture sector aligns with the ANZSIC[^] *Agriculture, Forestry and Fishing* industry. This report also uses data specific to the *Aquaculture and Fishing* industries. Aquaculture largely provides jobs in production and processing, supported by other occupations in areas like research.



84,000
 Workers in Agriculture, Forestry and Fishing in Victoria²



\$72 million
 Gross Value Added of Aquaculture industry, Victoria (2017/18)³



678
 Full-time equivalent jobs supported by the Aquaculture industry, Victoria (2017/18)⁴



45%
 Aquaculture share of the Fisheries And Aquaculture industry, up from 39% in 2007/08⁵

Sector composition

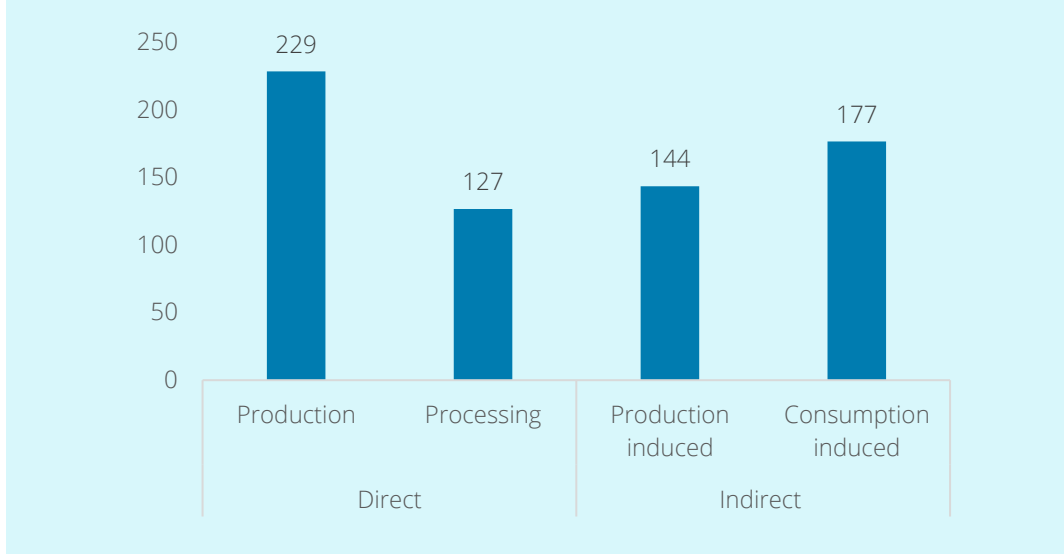
Key subsectors

Offshore longline and rack aquaculture	Offshore aquaculture
Food and beverage product manufacturing and retailing including online	Fishing support services
	Fishing, hunting and trapping

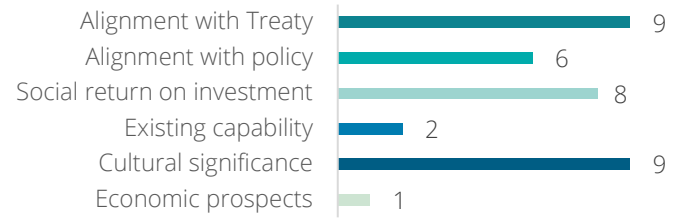
Key occupations

Farm manager	Academic
Hatchery manager	Aquaculture entrepreneur
Fishery officer	Consultant
Science officer	Aquaculture technician
Quality control specialist	

Employment breakdown in aquaculture, Victoria (2017/18) ⁶



Area of Interest - Aquaculture | Insights



Aquaculture did not score strongly against the economic and capability criteria in a multi-criteria analysis of growth industries for Aboriginal employment and businesses. However, there are promising signs that the aquaculture sector provides opportunity for Aboriginal businesses, with respect to cultural significance, policy and Treaty.

Economic prospects \$

While *Agriculture, Forestry and Fishing* is set to grow at a steady pace of around 2% over the next five years, aquaculture and fishing have more negative outlooks. IBIS World predicts 0.4% annual growth for *Aquaculture* and 0.3% annual growth for *Fishing*. This national slow growth is attributed to a slowing of growth in export and domestic demand for seafood, as the industry adjusts back to the 'new normal' following price hikes during the COVID-19 pandemic (related to supply chain disruptions).¹

Despite a slowing economic outlook for the industry, Australia still has a reputation as a sustainable and high-quality seafood supplier, with opportunities to increase demand for native species and in Asian markets.²

Research has also pointed to the sizeable economic contribution of the Aquaculture sector in Victoria. The National Fisheries and Aquaculture Industry Contributions Study estimated the value of the following Aquaculture sub-industries: Abalone, Salmonids, Blue Mussel & Other Molluscs, and Warm Water Finfish, reporting \$72 million in total Gross Value Added and 678 FTE jobs supported by the industry.³

Sub-industry example: Seaweed
 A Blueprint for Growth was published in 2020, highlighting the opportunity for the Australian seaweed industry to achieve \$100 million gross value of production (GVP) by 2025.⁴

The Blueprint detailed three critical success factors:

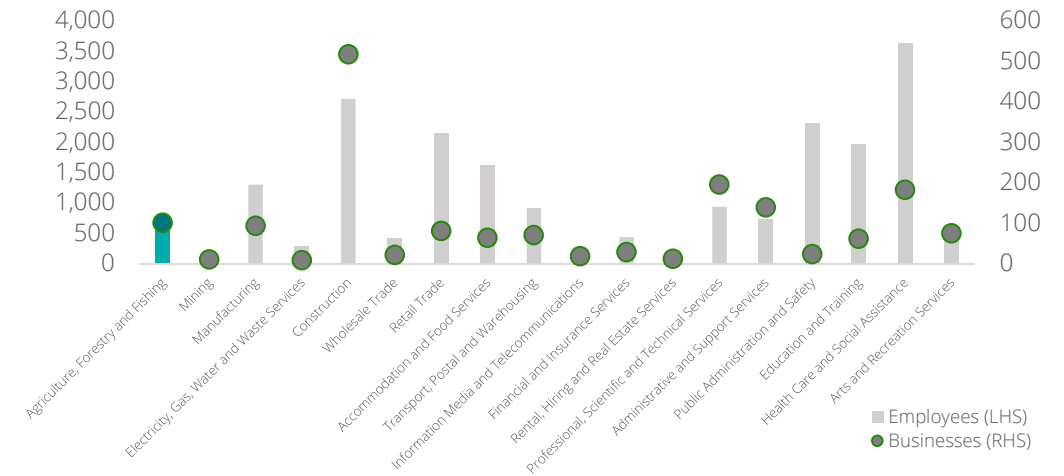
1. sector leadership and collaboration
2. production capability and scale
3. innovation for the future

Existing Capability Ω

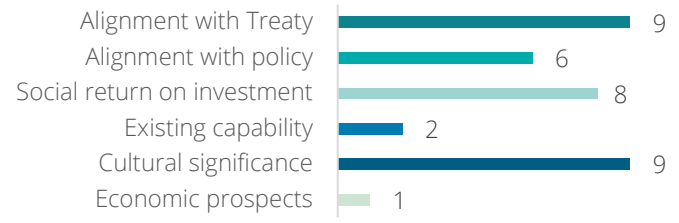


The *Agriculture, Forestry and Fishing* industry has low Aboriginal employment relative to other industries but has relatively large Aboriginal-owned business representation.

Aboriginal employment and businesses by industry, Victoria, 2021⁵



Area of Interest - Aquaculture | Insights



A greater Aboriginal presence in the Aquaculture sector is expected to have a high social return due to associated environmental and health benefits. Compared to other industries considered in the multi-criteria analysis, there is less policy investment in the Aquaculture sector; however there is still evidence of support from the Victorian Government.

Social return on investment

Aboriginal aquaculture practices can contribute to positive environmental outcomes, and improve health and social outcomes for Aboriginal communities.

Environmental

There is current consumer concern about the quality of practices and performance of fisheries and their effects on surrounding landscapes and its biodiversity. In Victoria and broadly, research is being undertaken into aquaculture practices that not only make little impact on the environment but can also be used as a carbon sink and reduce ocean acidity (particularly via seaweed farming).¹

Aboriginal aquaculture businesses have strong potential to minimise negative environmental impacts based on thousands of years of sustainable fishing practices, and are based on the following principles:

- *Take only what you need:* This rule is widespread, and often accompanies two others: don't take undersized or pregnant fish and don't overfish. When fish are allowed to breed and grow, their populations both are sustainable and can sustain a community when taken at the right time.
- *Seasonal fishing:* Over the generations, Aboriginal and Torres Strait Islander peoples living near the sea have amassed a great deal of knowledge around the best times and places to fish. Many coastal communities know which season it is from the natural signs around them: different flowers in bloom, changes to the colour of leaves, changes in tides and winds. The signs and seasons tell them which fish and shellfish ready to be taken so as to avoid overfishing and biodiversity imbalances.
- *Use of equipment that is made from natural fibres* and does not pollute our waterways with micropollutants and ripped plastic nets (e.g. in areas along river and creek systems, such as Maningrida in the Northern Territory, people developed basket fish traps and hand-held nets made of woven fibres).²

Health and social

Health and social benefits for Aboriginal people stem from spending time on Country and connecting to cultural practices through Aquaculture, as well as the health of the homes and waterways that are relied upon by communities.

Alignment with policy

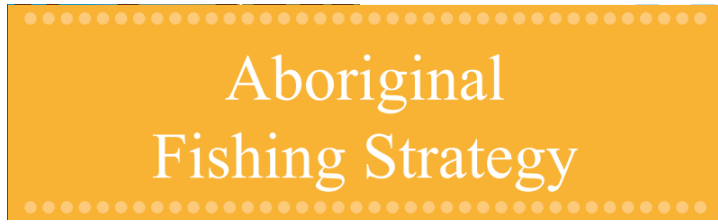
Policy support for the local Aquaculture sector is evident in the Victorian Government's \$1.25 million investment to support and grow the Victorian aquaculture sector, under the Victorian Fisheries Authority's (VFA) Aquaculture Strategy.³

The Victorian Government is also actively supporting Aboriginal businesses in aquaculture through:

- the Victorian Aquaculture Strategy's focus on engaging Aboriginal groups
- exemptions in the Fisheries Regulations for Aboriginal individuals⁴
- the Victorian Aboriginal Fishing Strategy.⁵

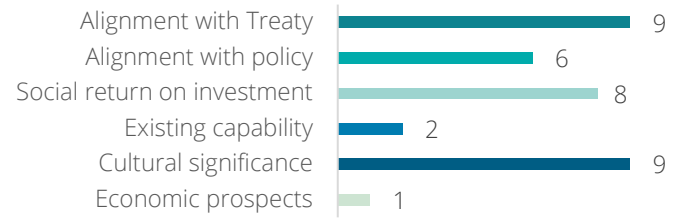
The 2024 Aboriginal Fishing Strategy provided 26 actions for recognition and economic development, with targets set to increase the meaningful participation of Aboriginal people in the Victorian Aquaculture sector. Two of these targets included:

- increasing aboriginal employment in fisheries Victoria to 5 per cent
- utilising the services of Aboriginal businesses to implement actions in the Aboriginal Fishing Strategy, subject to public sector procurement guidelines.⁶



Area of Interest - Aquaculture | Insights

Aquaculture performs very strongly against cultural significance and treaty, due to the sector connections to land and sea.



Cultural significance

Aboriginal Victorians have, for thousands of years, practiced traditional aquacultural practices in ways that sustain the land and connect with culture, Lore and tradition. These practices connect have deep rooted historical connection to traditional ways of living and strongly align with Traditional Owner cultural values. In today's Aquaculture sector, traditional practices can offer strategic, cost effective, low environmental impact approaches to the operations required.¹

Aboriginal business example: Budj Bim

Located in south-west Victoria, Budj Bim ('Big Head' in Gunditjmara) is named after the now dormant 30,000-year-old volcano that dominates the landscape. It is the only Australian UNESCO World Heritage site listed exclusively for its Aboriginal cultural values.

The Budj Bim Cultural Landscape shows the world's earliest living example of aquaculture with a history of kooyang (eel) farming dating back over 6,000 years.

As part of the Budj Bim Cultural Landscape, the Tae Rak Aquaculture Centre is a state-of-the-art facility designed to showcase one of the world's most extensive and oldest aquaculture systems to the public. It stands as an example of a strong tourism offering of the opportunity to partner Aboriginal aquaculture sites with businesses in the tourism and education sectors and / or commercialise their own operations through these pathways.²

Aboriginal presence example: Aboriginal Aquaculture Association

The Aboriginal Aquaculture Association (AAA) is a National not for profit corporation established in 2003 to facilitate meaningful participation of Aboriginal communities and Aboriginal entrepreneurs in the aquaculture sector. It serves as a resource body providing guidance and advice with respect to sustainable aquaculture development, regulation and management of aquaculture.³

Alignment with Treaty

In New Zealand, customary fishing rights are guaranteed to tangata whenua under *Te Tiriti o Waitangi – the Treaty of Waitangi*. Māori are guaranteed the undisturbed possession of their properties, including their lands, forests, and fisheries, for as long as they wish to retain them. This may be used as inspiration for Treaty negotiations in Victoria. Under *Te Tiriti o Waitangi – the Treaty of Waitangi*, the Crown's settlement obligations are settled by region, based on regional council and unitary authority boundaries. Settlements are usually made under regional agreements between the Iwi Aquaculture Organisations that represent a region, the Crown and the Trustee. Regional agreements can deliver assets in a number of forms, including as authorisations to apply to use aquaculture space, the cash equivalent value of that space, or as another benefit agreed between the Crown, iwi and Trustee.⁴

Inspiration can also be taken from the Māori version of article 2 which uses the word 'rangatiratanga' in promising to uphold the authority that tribes had always had over their lands and taonga. This choice of wording emphasises status and authority. In the English text, the Queen guaranteed to Māori the undisturbed possession of their properties, including their lands, forests, and fisheries, for as long as they wished to retain them. This text emphasises property and ownership rights. Article 2 provides for land sales to be affected through the Crown. This gave the Crown the right of pre-emption in land sales.⁵

Area of Interest - Aquaculture | References

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