



The Victorian Supply Chain Excellence Action Plan 2006

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Minister's foreword



In 2002 I launched the Victorian Government's Transport, Distribution and Logistics (TDL) Industry Action Plan. The plan established a new industry-Government partnership to secure Victoria as Australia's freight hub and the national leader in TDL industry innovation.

The Supply Chain Excellence (SCE) Action Plan 2006–2009 builds on the success of the TDL Industry Action Plan. Supply chain excellence is the key to sustaining and strengthening Victoria's significance as Australia's dominant freight transport and services hub.

The SCE Action Plan aims to ensure that Victoria keeps thriving and growing as Australia's State of Supply Chain Excellence and Gateway of Choice and so boost our productivity, business competitiveness and long-term prosperity.

This Action Plan lays out the priorities and targeted initiatives to drive our TDL industry-Government partnership over the next four years. It focuses on issues identified by industry as the key to long-term competitiveness – from new technologies, education and training to improving supply chain efficiencies, regulation and marketing.

Along with the Minister for Education and Training and the Minister for Transport, I would like to thank the Victorian Supply Chain Consultative Group and the TDL Industry Round Table for their efforts in delivering the TDL Action Plan and developing this new agenda.

I am confident that this commitment will continue to achieve the necessary reform and strengthen partnerships forged across and between industry and Government.

The Victorian Government looks forward to working with industry to deliver the SCE Action Plan and through it an even more innovative, competitive and internationally focused TDL industry.

A handwritten signature in black ink, which appears to read 'John Brumby'. The signature is fluid and cursive, with a small flourish at the end.

John Brumby MP

Minister for State and Regional Development

Acknowledgements

The SCE Action Plan has been developed in consultation with the TDL industry in Victoria and specifically with members of the TDL Industry Round Table (TDL IRT), the Partner Reference Groups and the Regional Round Tables.

The contribution of the following TDL Industry Round Table members is specifically acknowledged and appreciated:

David Doherty	Chairman – TDL Industry Round Table
Mark Holding	Logistics Association of Victoria (Deputy Chairman TDL Industry Round Table)
Neil Chambers	Victorian Transport Association
Scott Braddy	Supply Chain Council
John Anderson	Victorian Airfreight Council
Maria Palazzolo	GS1 Australia
Jim Brewer	Australian Production and Inventory Control Society
Madeleine McManus	Chartered Institute of Logistics and Transport Association
Mark Power	Chartered Institute of Purchasing and Supply Australia
Ian McMillan	Transport & Distribution Training Victoria
Barry Keogh	Tradegate ECA
Dennis O’Keefe	Health Purchasing Victoria
Keith Finkelde	Chair Business Systems PRG
Pieter Nagel	Chair Education and Training PRG
Bill Green	Chair Freight Intermodal Efficiency PRG
Bunny Carrigan	Chair Women in Supply Chain PRG
Nigel Edwards	Chair Small and Medium Business Enterprises PRG
Max Luff	Chair North East Victoria Regional Round Table
Ken Wakefield	Chair North West Victoria Regional Round Table
Nola Bransgrove	Chair Gippsland Regional Round Table
Rose Elphick	Victorian Freight and Logistics Council
Zoran Kostandinovski	Customs Brokers & Forwarders Council of Australia
Ian Bushby	DECA Training
John Clarebrough	Department of Infrastructure
Chris Ingham	Department of Education & Training
Hermione Parsons	Department of Innovation, Industry and Regional Development

The SCE Action Plan, which is the subject of this document, has its foundations in a decision in 1999 by the Victorian Government to undertake audits of a range of key Victorian industries including the Transport, Distribution and Logistics (TDL) industry.

Following the completion of the TDL Industry Audit in 2001, the TDL Industry Action Plan was launched in 2002 providing a framework for cooperative, strategic action through a powerful partnership between the TDL industry and the Victorian Government.

The new SCE Action Plan reflects the development and maturing of the industry-Government partnership and is the next vital stage in making Victoria's freight transport, distribution and logistics capability world-class.

The focus of the SCE Action Plan is on the freight transport, distribution and logistics industry and involves a broad range of business groups (see Appendix A) involved in complex supply chain relationships.

It has been prepared for industry and people who have an interest in the future capability and competitiveness of the complex interactions and sophisticated relationships, which are Victoria's supply chains.

The actions proposed in this Plan are directed at outcomes that are to be achieved through a collaborative and flexible endeavour between industry and Government over the next four years.

Executive Summary

Victoria – Australia's Pre-eminent Freight and Logistics Hub

Victoria is Australia's major freight transport and logistics hub, servicing the Melbourne metropolitan area, regional Victoria, New South Wales, Tasmania and other parts of Australia. Around 70% of Australia's total population and the bulk of its manufacturing capacity are captured in this economic zone.

The Victorian Transport, Distribution and Logistics industry is essential to the competitiveness of the Victorian economy as a whole in its role as a key enabler of economic transactions and activity. The industry's efficiency, vitality and innovativeness is vital to enhancing the global competitiveness of all Victorian industry.

Reflecting the significance of the TDL industry, the Victorian Government plays a key collaborative role in facilitating the growth and transformation of the TDL industry to increase the competitiveness and capability of the TDL industry and the Victorian economy as a whole.

Strong, collaborative, strategic action is being taken by the Victorian Government and the Victorian TDL industry to address the competitive challenges and heightened demands of the global economy.

TDL Industry – Government Partnership

A unique and powerful collaborative partnership between industry and Government has been forged which has strengthened cooperation, consultation and dialogue with the Government. The partnership is consolidated at its highest level by the commitment of three senior Ministers (and their Departments), key TDL industry representatives and their customers through a peak consultative body and industry reference groups.

This highly constructive industry-Government partnership, created through the 2002–2005 TDL Industry Action Plan, will be maintained and strengthened through the 2006–2009 SCE Action Plan.

As part of this partnership the Government, through the Department of Innovation, Industry and Regional Development and other agencies, also plays a central role in enabling access to strategic economic factors, smoothing structural change and advocating industry needs to strengthen and accelerate the growth and transformation of this key enabling industry.

Supply Chain Excellence Action Plan

The SCE Action Plan is based on the recognition that a unique integration of strategic thinking, planning and management in the harnessing of TDL resources and infrastructure is the essence of the efficient movement of goods and services to meet a diversity of customer needs. Supply chain excellence is the key to sustaining and strengthening Victoria's significance as Australia's dominant freight transport and services hub.

Over the coming four years the SCE Action Plan will focus on the following seven key strategic areas that consolidates Victoria's TDL industry capability and prominence within the Australian economy:

1. Partnerships
2. Business organisational and ICT systems
3. Education and training
4. Supply chain efficiencies
5. Government and regulation
6. Marketing and promotion
7. National TDL agenda.

These strategic areas, explained in detail in the following pages, are consistent with and complement Government initiatives in transport, manufacturing, regional development and infrastructure as well as education and planning.

They also create the foundation for supply chain improvements, enhanced partnerships and a stronger resolve within the TDL industry to meet the myriad of global and national challenges Victoria must face to ensure its status as the State of 'Supply Chain Excellence and the Gateway of Choice'.

1: TDL Industry Economic Significance and Emerging Trends

TDL Industry Economic Significance

The Victorian Transport, Distribution and Logistics industry is crucial to the competitiveness of the Victorian economy as a whole. It is a key economic enabler for all industries including manufacturing and agriculture. The industry's efficiency, vitality and innovativeness translate into productivity improvements, economic growth and the enhanced global competitiveness of all Victorian industries.

The TDL industry is extremely significant on a global scale as:

- the largest industry by sales revenue at \$US 1 trillion in 2005
- one of the top five industries along with Network Systems, Construction, Aerospace, and Financial Services
- the second largest global employer (3.5 million workers).

Within the Australian economy it makes a large, direct contribution to economic activity and is a key enabler for the rest of the economy.

The TDL industry:

- contributes \$16 billion annually to Australian GDP
- provides 237,000 full and part time jobs in Victoria¹
- generates 24% of the income produced by industry in Victoria².

Victoria is Australia's largest manufacturing centre and a major agriculture-producing State with almost 24% of total national production in 2005. The Port of Melbourne and Melbourne Airport respectively handle over 37% of the nation's container trade and over 30% of Australia's airfreight.

Global Trends

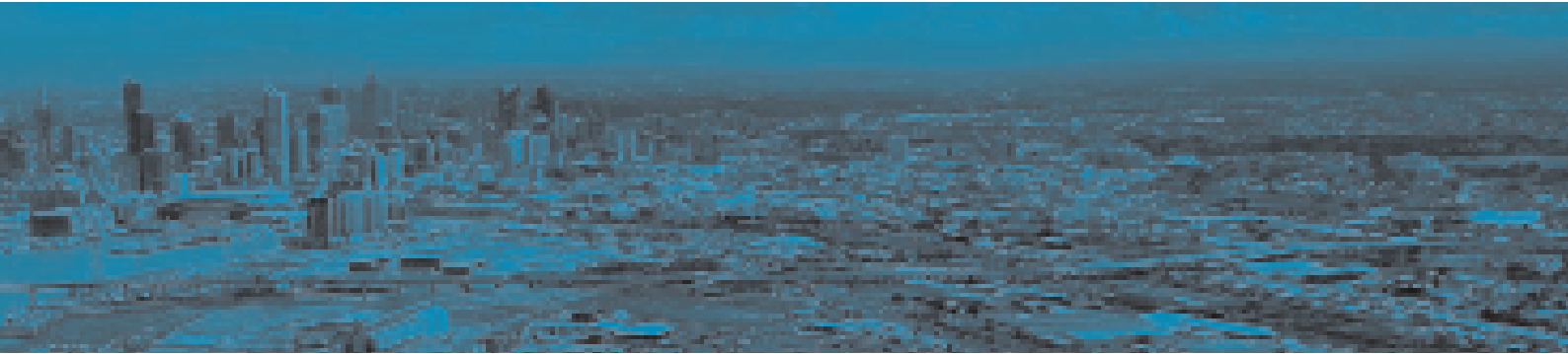
The global economic, social and political environment is increasingly complex and is changing rapidly, sometimes in unplanned and unexpected ways. This turbulent global environment has created significant challenges and new demands on the TDL industry. These include:

- supply chain excellence
- increased global competition
- technological change
- increased fuel prices and limited global resources
- emergence of new business models
- new strategic alliances along supply chains
- global over supply of transport
- customer expectations
- supply chain security
- growing freight task
- industry image
- skills shortages
- community values.

To sustain and enhance international competitiveness, the TDL industry must deal with these pressing demands and challenges and focus on its vision for achieving supply chain excellence through the industry-Government partnership and the SCE Action Plan.

1. The Australian Bureau of Statistics tracks two major sub groups of employment in the Transport, Distribution and Logistics industry. These are "Wholesale Trade" and the "Transport and Storage" categories ABS 6291.0.55.003 Labour Force, Australia, Detailed, Quarterly Table 05. Employed persons by State and Industry <http://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/6291.0.55.003>

2. Australian Bureau of Statistics Cat No. 8155.0.55.003 Australian Industry Experimental Estimates Summary of Operations by ANZSIC Subdivision, States, Territories and Australia, 2002-03



Supply Chain Excellence

Supply chain excellence is at the heart of global competitiveness. An integrated, seamless flow of freight and information along the whole supply chain is critical to industry, enterprise and regional competitiveness. Excellence requires that supply chains are customised to customer needs to provide unique solutions, create value for customers and users and generate sustained, competitive advantage.

Supply chain excellence requires a unique integration of strategic thinking, planning and management and the harnessing of TDL resources and infrastructure to achieve the efficient movement of goods and services to meet a diversity of customer needs.

Increased Global Competition

Global competition is increasing rapidly across all economic sectors in Asia and Eastern Europe. This growing competition, especially from China and India, is based on innovation and cost competitiveness.

The TDL industry in Victoria is crucial to achieving global competitiveness of supply chain activities across the Victorian and Australian economies and will play a key role in meeting these emerging, competitive challenges by enhancing the cost competitiveness of TDL.

Technological Change

Technological change is having a profound impact on the way the TDL industry operates and the skills required for working within the industry.

Innovations within the industry are based on the application of information and communication technologies that facilitate multi-lateral end-to-end supply chain integration.

Intelligent Transport Systems also allow the enhanced management and control of loads, vehicles and personnel.

Increased Fuel Prices and Limited Global Resources

The trend in fuel prices for all transport modes has been rising steadily for some years and is likely to continue as the world's demand for energy resources increasingly exceeds supply.

The TDL industry must adopt new fuel saving or alternative fuel technologies in the provision of their services and make decisions about appropriate use of existing oil resources. A change in the price of oil will also drive a re-assessment of the use of each transport mode.

New Business Models

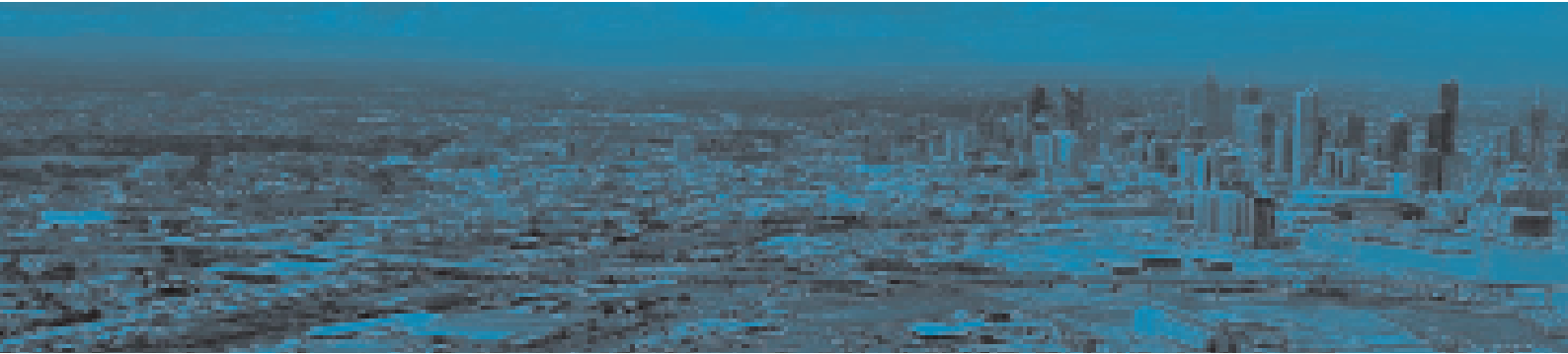
The freight transport, distribution and logistics industry is a key economic enabler, moving goods and services from origin to the end customers.

New and emerging production and distribution business models require that the TDL industry continuously develops and implements innovative, world best logistics strategies and practices to meet customers' changing needs.

New Strategic Alliances Along Supply Chains

In order to achieve operating efficiencies, increased profitability and to enhance their competitiveness, significant enterprises within the TDL industry in Australia and overseas are seeking to create new strategic alliances and mergers with competitors and suppliers. In many cases this is creating integrated, expanding enterprises with considerable market power and leverage to increasingly control the terms of trade.

This global trend has the potential to fundamentally alter the market in which freight logistics services are provided in Australia, the way in which Victorian TDL companies will do business in the future and the level of influence governments will have on the process.



Global Oversupply of Transport

There is considerable competition in the provision of freight transport. Investment in capital involves considerable sunken costs in relation to all modes, especially air, rail and sea transport. In this competitive environment, suppliers set their prices at significantly reduced margins so transport services tend to be under-priced and therefore oversupplied.

The market for transport services fails to provide correct signals for rational decisions to be made in the provision and use of these services. Goods and services are transported unnecessarily, resources are wasted and transport services are oversupplied in some regions and undersupplied in others.

Customer Expectations

Expectations of good customer service have continuously risen over the last decade. Consumers expect goods and services to be provided on time, in full and in good condition.

The rise of e-commerce and increasing familiarity with the process of on-line purchasing and delivery, through integrators which take goods door-to-door around the world, has further increased customer expectations, especially in relation to speed of delivery and competitive costing.

Supply Chain Security

The threat of global terrorism, increased awareness of bio-security issues and new technologies that are readily available to criminals and terrorists have dramatically increased the importance of supply chain security to prevent illegal or dangerous goods entering the supply chain.

Improved supply chain security is reshaping relationships and responsibilities along the chain and requires the application of sophisticated organisation and management systems and monitoring and tracking technologies.

Growing Freight Task

Rapid economic growth, especially in Asia, combined with steady domestic growth, will dramatically increase the size of the freight task over the next five to ten years.

Regional and inter-capital freight flows could grow at up to 8% per year resulting in a doubling of freight volumes by 2016.

Innovative and commercially realistic strategies are required to enhance the capability and capacity of the Victorian TDL industry if it is to be able to deal effectively with this growth in the freight task.

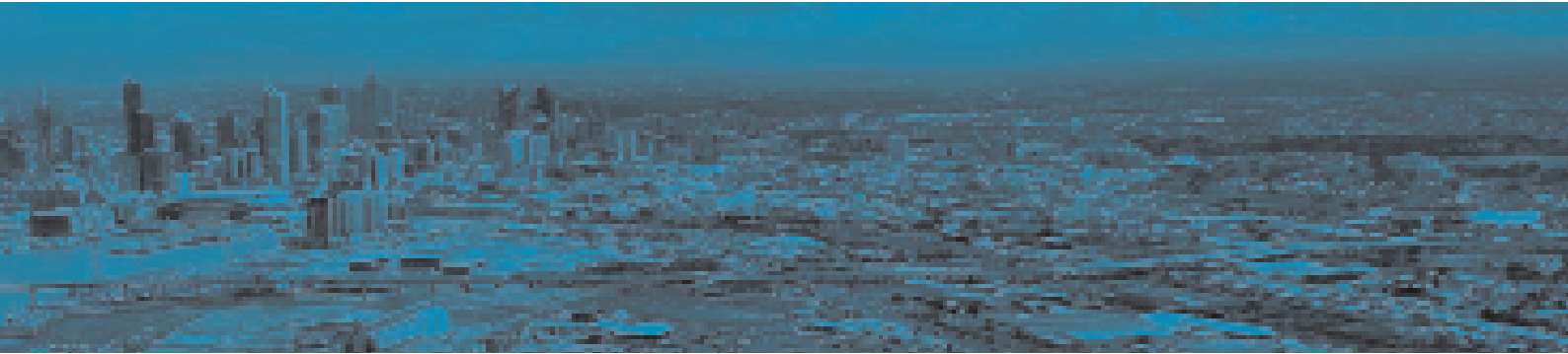
This includes working toward the Government's objective to have 30% of freight transported to and from all Victorian ports by rail by 2010.

Industry Image

Many people have a limited understanding of the industry's size, function and economic importance. It is seen as a 'blue singlet and tatts', low technology, low skilled and low paid industry with few challenges or career opportunities and very limited job satisfaction.

Today's TDL industry is in fact modern, highly professional and driven by customer service. It involves advanced technology, complex organisation and high level skills offering good conditions and work practices.

Young people, who are the future core of the TDL industry workforce, are unaware of and generally reject opportunities for involvement in the industry. This contributes to a medium term skilled labour shortage that may escalate into a major problem.



Skill Shortages

Skill shortages are a complex challenge for the global and Australian TDL industry especially in warehousing, driving, logistics and supply chain management.

Skill shortages are the result of a range of factors including:

- a lack of accurate market signals reflected in the low price of labour for particular high value jobs
- inadequate information on and planning for training in jobs that are increasingly in demand
- the industry's older age demographic resulting in a larger than proportional number of TDL workers retiring in the next five years
- supply constraints resulting from the industry's image as low skilled and male dominated.

Community Values

The community increasingly expects socially responsible attitudes and behaviour by business and industry throughout the economy.

This is reflected in the TDL industry by calls for greater attention to health and safety issues including responsible activities by transport operators involved in all transport modes, especially road transport.

Government will increasingly reflect community expectations by regulating the activities of supply chain operators to ensure they meet community standards as reflected in recent legislation, enforcing the chain of responsibility within the TDL industry.

2: TDL Industry-Government Partnership

Since 2001, the Victorian Government and TDL industry have worked together to realise a joint vision for Victoria as the State of Supply Chain Excellence. This vision was given high priority in 2002 with the creation of the TDL Industry Action Plan.

The 2002–05 TDL Industry Action Plan:

- established a new industry-Government consultative mechanism
- promotes initiatives including strategic partnerships, innovative practices to attract sustainable investment and skilled employment opportunities.

The Action Plan's focus was on the business of transport, distribution and logistics and the importance of strategic links between Government, business and industry organisations along supply chains. This focus and the initiatives that arose from it are consistent with the Victorian Government's roles as:

- leader in areas of government responsibility
- facilitator where market failure occurs
- mediator of some of the impacts of structural change
- enabler of industry access to infrastructure and an educated/skilled workforce
- advocate of industry needs and interests.

The experiences and insights generated through the TDL Industry Action Plan provide the foundation for the SCE Action Plan.

The key feature of the TDL Industry Action Plan was the establishment of a unique and powerful collaborative partnership between industry and Government.

It included initiatives to strengthen cooperation, consultation and dialogue between the Government, the industry and TDL businesses and their customers by establishing a peak consultative body and a range of industry reference groups. This high level collaborative partnership is comprised of four key elements.

Victorian Supply Chain Consultative Group

The Victorian Supply Chain Consultative Group (VSCCG) links the Ministers for three key Government portfolios: the Minister for Innovation and State and Regional Development, the Minister for Transport and the Minister for Education and Training and their departments with peak TDL industry associations, TDL companies and their customers. The involvement of three of the Government's most senior Ministers reflects the significance the Government places on the industry and its high level of commitment to the international competitiveness of the Victorian economy.

The VSCCG reviews the progress of the Action Plan and sets priorities for addressing supply chain issues. It provides the mechanism for the TDL industry to address Ministers on a broad range of issues and provides insights into the challenges confronted by the industry and the issues and directions Government must consider in consolidating the competitiveness of the Victorian TDL industry.

TDL Industry Round Table

Within this consultative structure the TDL Industry Round Table (TDL IRT) is the pivotal forum of industry and Government representatives. Future directions for key policy issues are raised and discussed so that a well considered and cohesive industry viewpoint can be formulated for consideration. It reports directly to the Victorian Supply Chain Consultative Group (VSCCG), see Figure 1: TDL Industry-Government Partnership Structure.

The TDL IRT draws together a broad range of TDL industry interests and expertise creating a unique network of perspectives that are available in no other context and seeks to lead and support the initiatives of the Action Plan.

The TDL IRT is also responsible for establishing, supporting and focusing the various Partner Reference Groups (PRGs), whose role is to address specific topics and priorities, and the Regional Round Tables, which focus on regional issues.

TDL Industry-Government Partnership Structure

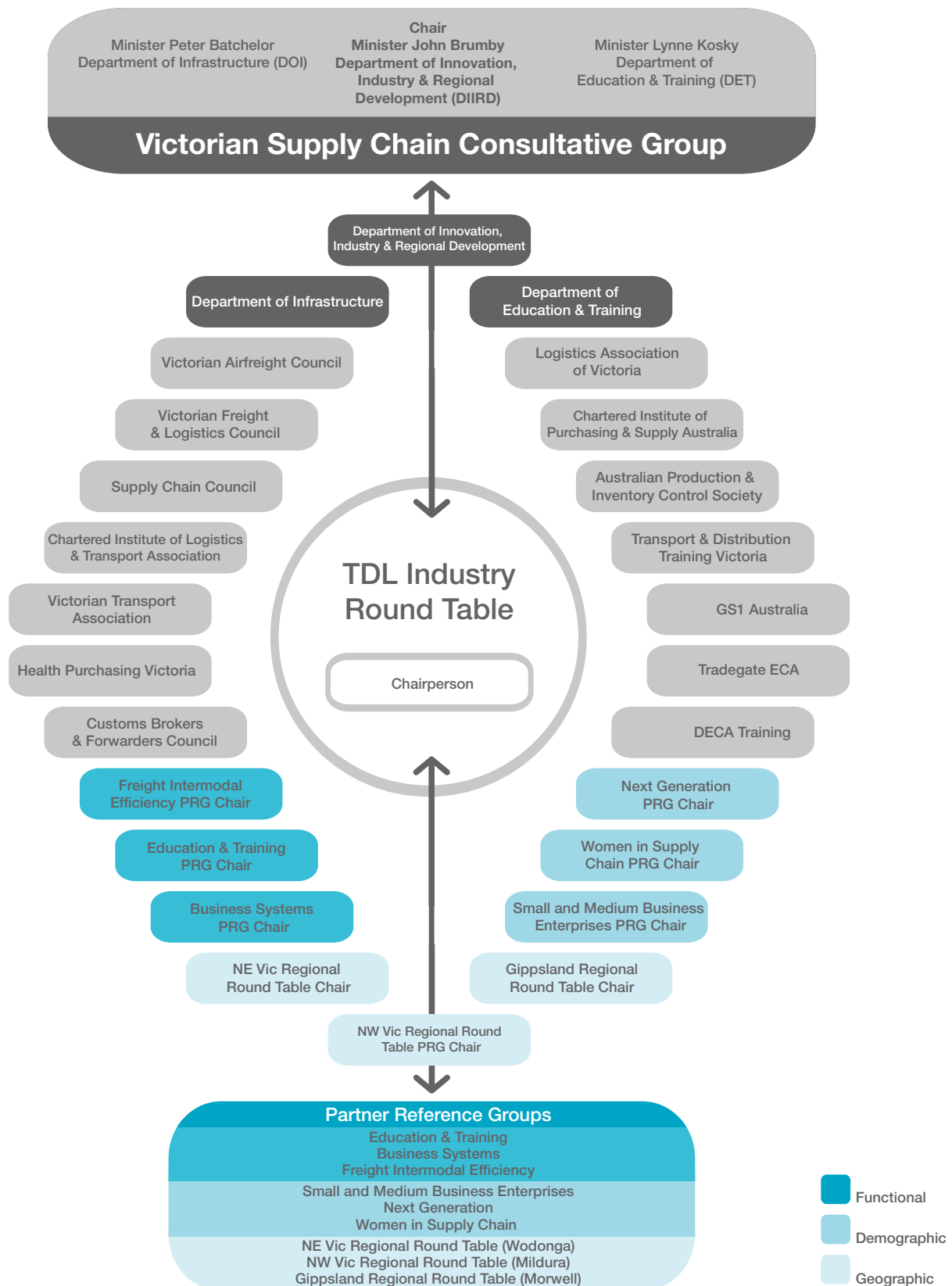
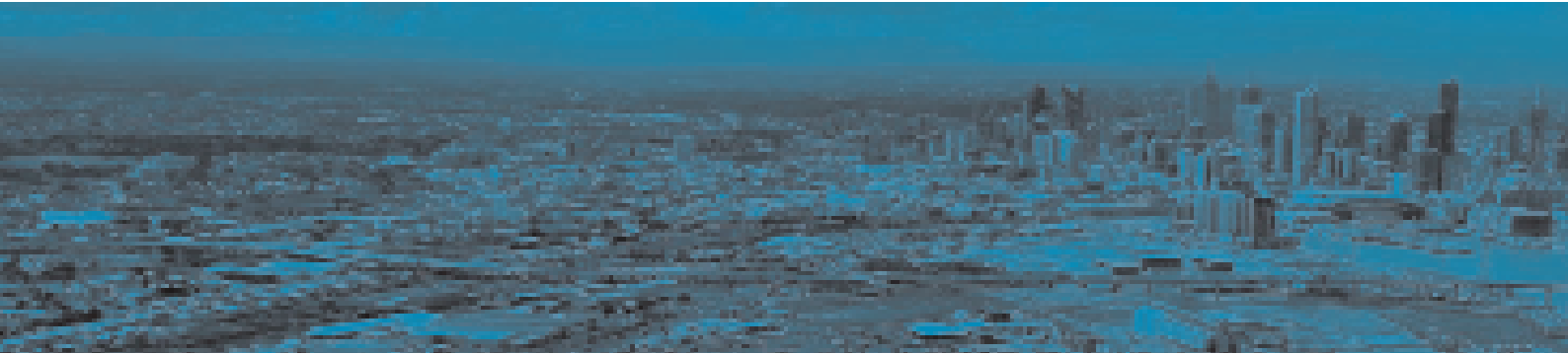


Figure 1: TDL Industry-Government Partnership Structure



Partner Reference Groups

The TDL IRT establishes and supports various specialist Partner Reference Groups (PRGs) whose role is to address in detail, critical industry issues and priorities. The PRGs allow industry associations and interested experts from TDL companies to work collaboratively on Action Plan initiatives and other issues of vital importance to Victoria's TDL industry. These PRGs are:

- Education and Training
- Business Systems
- Small and Medium Enterprises
- Next Generation
- Women in Supply Chain
- Freight and Intermodal Efficiency.

The chair of each group is a member of the TDL Industry Round Table.

TDL Regional Round Tables

TDL Regional Round Tables (RRTs) based in North East Victoria, North West Victoria and the Gippsland region bring together local transport providers, business bodies, tertiary institutions and state and local Government representatives in an ongoing forum focused on TDL industry issues.

Each of these regions has developed a RRT due to its strategic location and the presence of TDL companies and bodies that make them a critical link in national road and rail supply chains.

The chairs of the RRTs are members of the TDL Industry Round Table.

Growing the Partnership

The creation of a highly cooperative and collaborative culture within a fiercely competitive industry and between the industry and Government has been a key achievement of the TDL Industry Round Table and the 2002–05 TDL Industry Action Plan that will be strengthened and extended through the 2006–09 Victorian SCE Action Plan.

The TDL Industry-Government Partnership at Work – Two Case Studies

Transport Company Benchmarking Study

Successful benchmarking for any industry needs information on the business processes of that industry. In a large and complex industry like TDL, this requires a high level of commitment and cooperation between a wide range of stakeholders. The TDL industry-Government partnership has pulled together a group of players that has produced otherwise inaccessible information describing how computer based business systems are used across the industry.

This included the:

- TDL Industry Round Table, for concept and coordination
- Victorian Transport Association, which brought 54 transport companies into the project
- Business Systems Partner Reference Group, for methodology and contact with IT companies
- TDL Regional Round Tables, involving regional companies
- Department of Innovation, Industry and Regional Development which funded the project.

Outcomes that were achieved included:

- 54 companies benchmarked against each other
- A report of the whole process for transport companies
- A report for IT companies on TDL industry software needs
- A DVD demonstrating systems and strategies of four 'best' companies
- A series of workshops for hundreds of transport companies and IT companies to rollout the findings and build the benchmarking base.

All this grew from sitting in TDL Industry Round Table discussions and making a shared commitment to undertake the work that no one party could achieve on its own.

Business Activity Harmonisation Study (BAHS)

Major long standing operational disconnects along Melbourne's port-related supply chains lead supply chain participants to develop techniques and strategies to overcome these impediments. The complexity and seriousness of the problem demanded unprecedented cooperation and collaboration between the TDL industry and the Victorian Government in a leading edge, internationally recognised change management process involving:

- TDL Industry Round Table
- Victorian Freight and Logistics Council
- Freight Intermodal Efficiency Group
- National industry groups including AFCN and ALC
- Victorian Government Departments.

BAHS Stage 1 unlocked the knowledge and expertise of stakeholders in the Port of Melbourne logistics chain. 200 key issues were aggregated into six key areas of action. Stage 2 involved the development of solutions, in which experienced TDL industry members assisted in filtering, refining, sorting and ultimately verifying the false assumptions, issues and possible solutions.

Stage 3 involved a National Plenary, which examined the BAHS work in detail, validated it, further refined the understandings and potential solutions and confirmed its leading edge status.

The Victorian TDL industry-Government Partnership is now engaged in Stage 4, the implementation of practical and targeted actions to address operational disconnects and impediments in port-related logistics chains. It involves four integrated programs that will transform sea freight and landside systems to be world-class.

For further details on these case studies see Section 3.4 'Supply Chain Efficiencies' and Appendix C

3: Victorian Supply Chain Excellence Action Plan 2006–2009

The 2006–2009 SCE Action Plan is the pre-eminent vehicle for carrying forward the achievements and initiatives of the previous four years and addressing the current and emerging challenges for the TDL industry and Victoria in the future.

Supply chains are the complex sequence of routes, actions, links and relationships through which materials, products and services are moved. These supply chains involve the infrastructure and physical movement of freight and also alliances, logistics and the electronic and documentary transactions that authorise transfers between parties and transport modes and arrange payment.

An integrated seamless flow of freight along the whole supply chain is critical to each company along the supply chain, industry as a whole, and regional competitiveness. Excellence requires that supply chains be customised to provide unique solutions, create value for customers and users and generate sustained competitive advantage.

Integration of strategic thinking, planning and management in the harnessing of TDL resources and infrastructure is the essence of the efficient movement of freight to meet a diversity of customer needs.

The following examples of meat and music supply chains illustrate the potential strategic, management and operational complexity that exists in every supply chain:

Supply Chain Complexity Example 1:

Rhythm and Blues

A 14-year-old rhythm and blues fanatic has bought music-composing software over the Internet from a supplier in the US. This purchase triggers the delivery of two CD disks to a Melbourne household.

But what was actually involved here? What does it take to make the delivery?

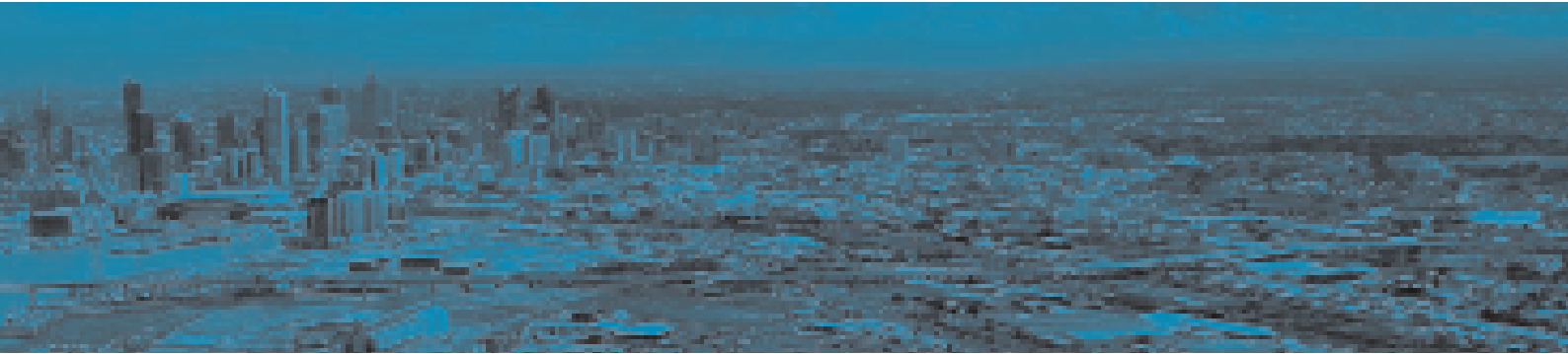
It takes the coordination of a complex sequence of actions, links and relationships that records the order, plans and coordinates the delivery, makes up the package, stores it, transports it and finally delivers it in full, intact and on time to the right address in Coburg.

The whole process is possible because there are warehouses, roads and bridges, trucks, trains, airports, airplanes and all the necessary physical infrastructure and equipment available to deliver the package. And behind this complexity of alliances, relationships, transport infrastructure and equipment lies the complex foundation and superstructure of the supply chain.

These include: sophisticated long term thinking and planning that constitutes a supply chain strategy; complex organisational systems that coordinate relationships and activities of individual companies providing different vital and interdependent services; ICT systems that are central to this coordination and to successful service provision and large ongoing capital investments that provide essential infrastructure and equipment.

The delivery of our package of CDs was a one-off. It was customised to meet the unique needs of the software supplier in the US and our 14-year-old R&B fanatic in Melbourne – the supply chain provided a unique service that took the package of disks from Santa Cruz California to Coutts St in Coburg.

Two pristine music composing CDs that were otherwise unattainable were quickly in the hands of a happy R&B fan because supply chain providers coordinated their services in a unique and highly efficient combination to plan, manage and implement a complex task so well that the 14-year-old is likely to take the service for granted, just like the rest of us.



Supply Chain Complexity Example 2:

Fillet Steak

John Smith is a beef farmer from Gippsland who has a secret admirer in Philadelphia USA.

Gracie Pickles reckons she's seen it all in her 99 years but nothing as good as John's fillet steak. She is on the end of an extraordinary supply chain that starts on his farm.

John's cattle are all individually ear tagged for supply chain identification. He knows exactly what treatments and drugs each has received and what fertilisers and herbicides has been used on the paddocks where the cattle graze. All this vital information is documented in an electronic system that, by the time Gracie gets her fillet steak, will provide a complete profile of the progress of the meat products along the supply chain.

At the abattoir in Melbourne, supply chain systems monitor and control the treatment and condition of the meat products from each animal as they are processed, sorted and packaged. New data is added to the electronic document system on the origin of the product, the manner in which animals are processed, the quality of the product and how it is handled and refrigerated.

Throughout its journey in the container, by road from the abattoir, through the Melbourne Port, on the ship, through the US facilities and systems and ultimately to its final destination in Gracie's neighbourhood store, a highly sophisticated supply chain is smoothing the way.

In the container, Gracie's fillet steak has been refrigerated at just the right temperature, continuously monitored by

in-container systems. These and other systems provide important information such as the fact that the meat products have been kept in the correct environment throughout the manufacturing, transport and the logistics chain process. They are safe, secure and protected by Radio Frequency Identification (RFID) systems on the container that prevent illegal access and indicate if locks have been tampered with.

Supply chain systems also allow container conditions to be remotely monitored using satellite technology so owners can check conditions and act immediately if required. Those same technologies allow the location of the container to be continuously monitored. They ensure that Gracie's fillet steak will be much less likely to be delayed or lost so that freshness and quality are enhanced and food safety is assured.

The integrated supply chain data systems also ensure that products move quickly through Customs and terminal release processes in the US because all authenticity, food standards, bio-security and regulatory steps and requirements are correctly documented and complete.

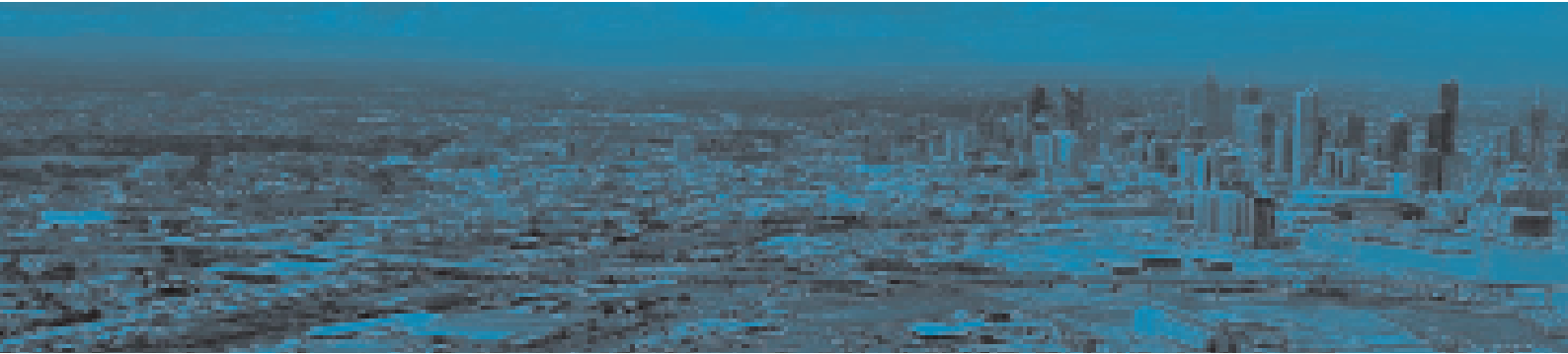
By the time the fillet steak gets to Gracie's local store it is fresh, healthy, safe and tender and of the highest quality thanks to John Smith's expertise and the extraordinary care and efficiency of supply chain providers from paddock to the supermarket shelf.

The SCE Action Plan:

- continues to emphasise the unique, ongoing partnership between the TDL industry and Government to drive change and innovation in the industry
- focuses on the relationships and communication between participants in the supply chain and ways to improve the business of freight and logistics
- details an ambitious program of current and future actions to support this vision of supply chain excellence.

The SCE Action Plan addresses the key challenges faced by the TDL industry through seven key action areas that will be the focus of activity over the next four years, these are listed below and discussed in the remainder of the document:

- 1 Partnerships
- 2 Business organisational and ICT systems
- 3 Education and training
- 4 Supply chain efficiencies
- 5 Government and regulation
- 6 Marketing and promotion
- 7 National TDL agenda.



3.1 Partnerships

The unique industry-Government partnership created as part of the 2002–05 TDL Industry Action Plan establishing the TDL Industry Round Table as the ‘engine room’ of TDL industry action is a key achievement for the State of Victoria.

This consultative mechanism has allowed Government and industry to take a high-level, strategic view of problems, challenges and issues facing the transport, distribution and logistics industry.

The successful partnership between Government and the industry reflects the widely held view that future productivity improvements will rely as much on optimising supply chain management as micro-economic changes at the workplace level and transport infrastructure development.

In order for industry to more systematically and comprehensively address supply chain issues, the consultative partnership established under the TDL IRT structure will be supported and enhanced.

Industry-Government Partnerships

Over the next four years the industry-Government partnerships will:

- establish new groups where appropriate
- refine and extend membership to ensure they effectively represent the TDL sector
- properly utilise and embrace the skills and experience of all members of the TDL IRT, the PRGs and the RRTs to allow them the carriage of key TDL projects
- review governance models to best utilise the contributions and inputs of members, and develop appropriate rules of procedure
- review the status of existing projects and establish agreed priority projects for funding and develop workplans to address these
- collaborate with all relevant organisations.

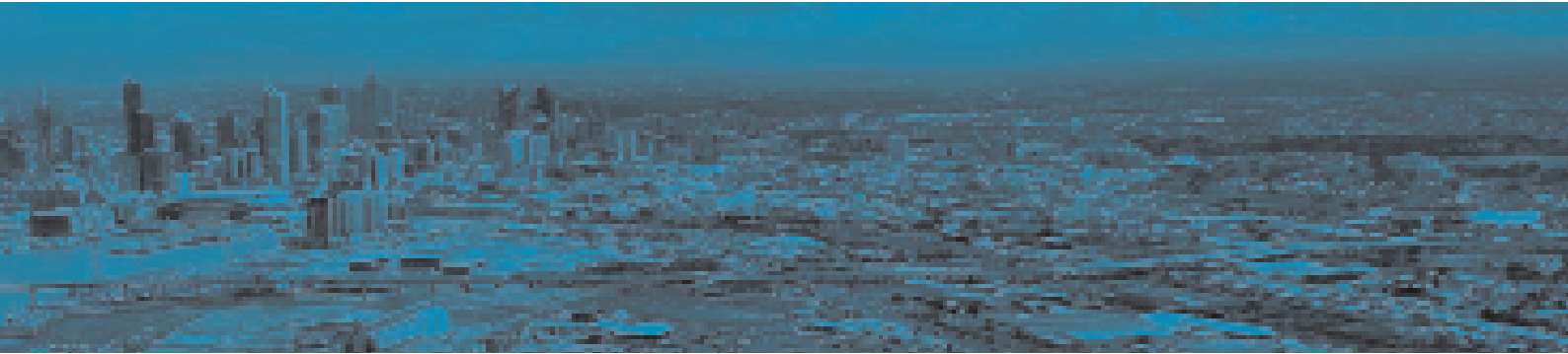
TDL Industry Round Table

The TDL IRT role will be enhanced and broadened to reflect its primary significance as the main driver of dialogue and action for the Victorian TDL industry in its partnership with the Government.

It should also be recognised as a key source of information on supply chain optimisation and as the facilitator of improved interaction between Government, industry and consumers of TDL services.

Over the next four years the TDL IRT will:

- initiate and provide input into Government proposals to position Victoria as the State of Supply Chain Excellence and the Gateway of Choice
- involve industry partners in the TDL agenda, collaborate with the VSCCG and cooperate with national agencies
- take a leading role in addressing key issues within the Victorian TDL industry including education and training, ICT and business systems, TDL industry image and profile, and supply chain efficiencies
- identify and pursue opportunities for improving partnerships between TDL industry associations and Government to avoid duplication and/or waste
- further develop and sustain an appropriate network of Regional Round Tables within Victoria and support initiatives, activities and provision of funding in those regions
- further develop and sustain appropriate, clearly defined Partner Reference Groups with focused activities and promote appropriate progress in selected projects to ensure the achievement of timely outcomes
- further develop and maintain an effective organisational structure including the Secretariat
- seek to generate industry funds to allow proper resourcing of activities and opportunities.



Regional Round Tables

Regional Round Tables (RRTs) based in North East Victoria, North West Victoria and the Gippsland Region provide an ongoing forum for regional industry participants and stakeholders. As regional industry stakeholders identify TDL industry issues and organise regional networks new RRTs will be established in other regions of Victoria.

Over the next four years the RRTs will focus on:

- establishing the directions of the industry in the region including the identification of key infrastructure needs and skills gaps
- consolidating Victoria's regional transport hubs as key components of state and national TDL networks
- providing local insights into state-wide supply chain policies and programs.

Partner Reference Groups

The six PRGs have facilitated, and in some cases driven, wide-ranging change and innovation. Achievements and future priorities for these are discussed under the key strategic areas that follow, in particular 3.2, 3.3 and 3.4.

As they complete their work, some PRGs may cease operation. Where there is a clear need or emerging issue, new PRGs may be formed over the next four years. A PRG for Freight Owners and Logistics Managers is one such group that may be established on the basis of a clear need.

3.2 Organisational and ICT Business Systems

Next-generation Information and Communications Technology (ICT) and organisation systems will play a key role in improving TDL industry performance, lifting productivity and enhancing customer service.

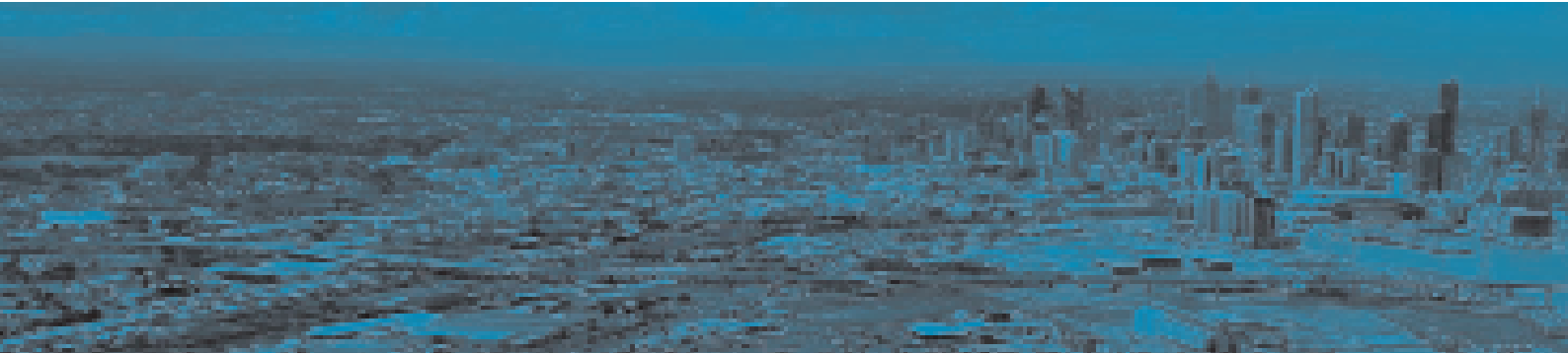
Optimising organisational processes and business systems and implementation of new ICT systems and technical solutions appropriate to different types of TDL businesses and customers is of fundamental importance. Education, training and support networks are vital supporting elements.

The TDL industry must streamline the processing of business transactions to reduce costs, improve turnaround times and improve the quality of data. This can be achieved through the development of efficient business systems that make use of best practice technological infrastructure and appropriate automation to meet global standards.

By contributing to this, the Victorian Government identifies key electronic gaps in Victoria's supply chain system and facilitates economically and commercially optimal solutions, which are then implemented by industry to fill those gaps.

As part of this approach, three broad categories of activities are required:

- business content definition – identification of critical transactions and information flow within industry lines of business, including defining message and workflow standards
- business system implementation – involvement and scheduling of participants to implement solutions based on business content definition
- shared infrastructure spanning business and systems – identification of whole of industry issues that require a common solution and avoidance of fragmentation.



In this context, the mission of the Business Systems PRG is to support the development of efficient business systems and technical frameworks that support supply chain excellence by:

- developing and understanding Victorian business processes in an Australian and international context
- identifying opportunities for the application of best practice models through improved interoperability and the take-up of global standards
- developing specifications and solution frameworks for critical business transactions.

The Small and Medium Enterprises (SME) PRG is concerned primarily with small transport operators such as hauliers, sub-contractors and other categories of micro business that have strong operating expertise. Many struggle with a high workload and extensive paperwork demands. The SME PRG is focused on assisting SMEs in identifying and implementing practical, accessible and cost-effective ICT and business organisation solutions for these businesses.

This focus places the SME PRG's activities squarely with those of the Business Systems PRG and over the next four years they will work in cooperation on programs to promote technologies to drive supply chain efficiencies for SMEs especially in relation to the application of ICT and related organisational systems.

Investigate Business System Needs

There is a pressing need to establish and codify the current state of ICT and business systems across the supply chain.

Over the next four years, the Business Systems PRG will address this by:

- assessing current and emerging business systems and technologies
- mapping and promoting an understanding of the nature and shape of Victoria's TDL business domain
- investigating the transaction cost structure of the Victorian TDL industry

- investigating drivers for change in TDL business ICT systems
- identifying opportunities for electronic commerce cooperation and improvement, the involvement of key stakeholders in this and the establishment of action research projects to pursue these opportunities
- investigating and advising Government on appropriate ICT architectural patterns and infrastructure for the TDL industry.

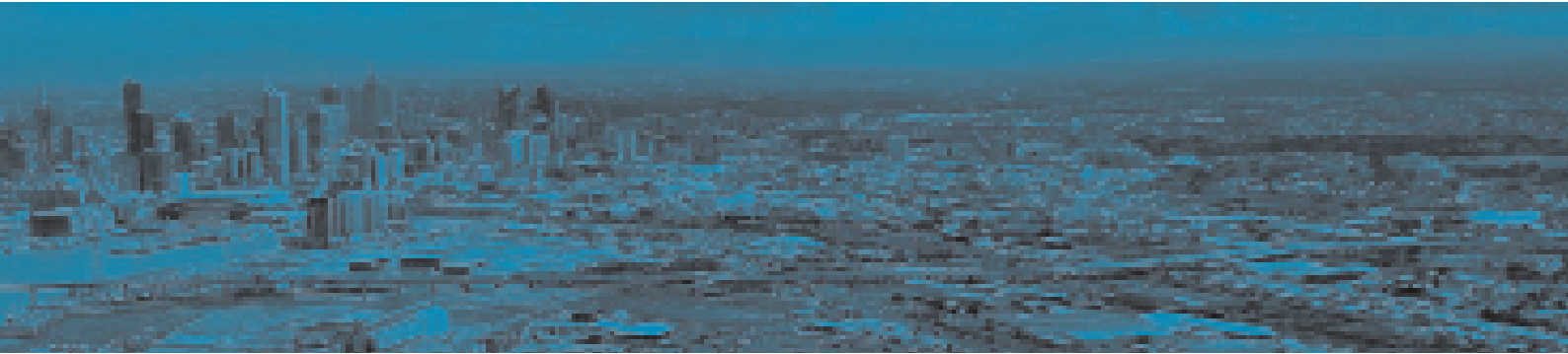
Take-up of ICT and Business Systems

The use of appropriate ICT and business systems is critical to the establishment of an integrated, seamless flow of freight along the whole supply chain. However, much of the Victorian TDL industry, especially SMEs, is unaware of the importance, or has not considered improving ICT and business systems.

Businesses need information and real, practical examples of how ICT and business systems can work for them. There is a need to provide industry with information and case studies on ICT and business system applications that will inform and motivate them.

Over the next four years uptake of ICT and business systems by Victorian enterprises will be promoted by the Business Systems PRG, in conjunction with the SME PRG:

- developing and distributing case studies and benchmarking examples of best practice in organisational systems and technologies
- assisting SMEs to gain organisation and ICT systems capability and achieve more efficiency in trading and supply chain relationships
- encouraging and facilitating uptake and effective implementation of appropriate business systems and technologies across the industry.



Global Industry Standards

To ensure supply chain excellence, technologies and standards used along supply chains must be based on open and global supply chain standards such as those administered by GS1 Australia (formerly EAN Australia), Tradegate ECA, Standards Australia and others where appropriate.

These systems enable trading partners in diverse supply chains locally, nationally and globally to identify and communicate information regarding products, assets, services and locations through:

- bar codes
- global data synchronisation
- Radio Frequency Identification (RFID)
- electronic business messaging.

Over the next four years the Business Systems PRG will:

- support and facilitate harmonisation of relevant standards
- support the development and adoption of global standards
- facilitate and encourage interoperability of systems between trading partners
- encourage the use of common systems by Victorian enterprises
- collaborate with other groups, researchers and developers.

Smart Freight Program

Through the application of ICT solutions the Smart Freight Program aims to generate efficiency gains in container movement through the Port of Melbourne supply chain. In practice this program seeks to identify new opportunities for interoperability and to remove gaps between users.

It is currently focusing on a number of key areas including:

- real-time information for fleet operators and truck drivers (including truck queuing)
- extension of port management systems including channel and berth services and hazardous cargo notification
- promulgation of the Port of Melbourne Supply Chain Map and Model for education and training
- container management tools
- potential trade community ICT systems (i.e. a common place to do business on the Internet, also referred to as a 'single window').

Over the next few years the Business Systems PRG will support and actively participate in the Smart Freight Project and in the implementation of its systems.

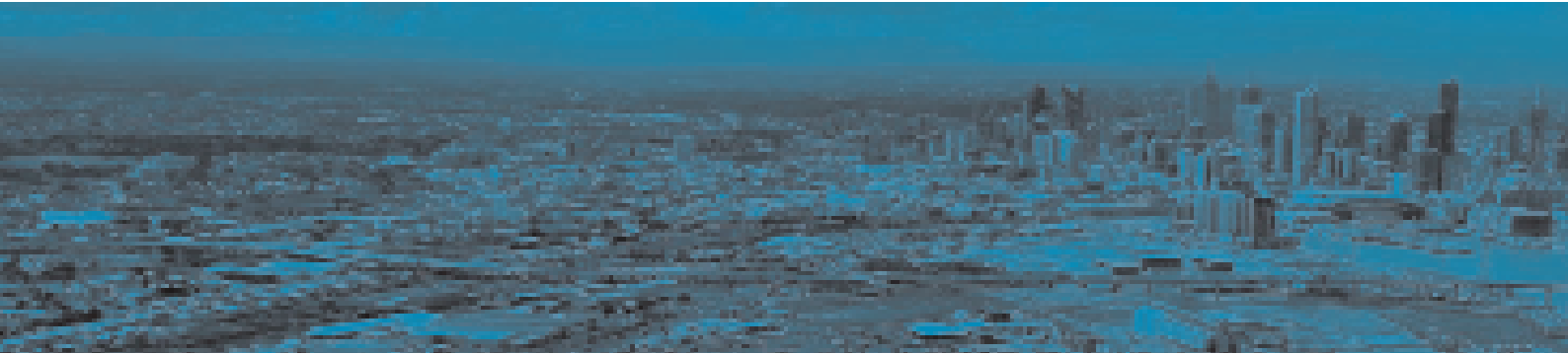
Emerging IT Skills

The New Skills Program is seeking to identify the emerging IT skills that workers will need in the future.

Information and communication technologies will become increasingly important in the growth and competitiveness of the Victorian TDL industry.

Workers in the industry will need to become increasingly ICT literate but their specific needs are not well defined. The New Skills Program can play an important role in more clearly defining the future IT skills needs of TDL workers.

Over the next four years the Business Systems PRG will harness the experience and findings of the New Skills Program (with the Education and Training PRG) to better understand emerging IT skills needs and the best way of enhancing and updating IT skills across the TDL industry.



3.3 Education and Training

An appropriately skilled TDL industry workforce is essential to meet the needs of an efficient and growing Victorian economy and to facilitate the growth of international trade to and from Victoria.

The education and training challenge for the TDL industry over the next four years and beyond is to address and accommodate emerging trends within the industry. This will place increasing emphasis on logistics and supply chain management, the acquisition of complex skills at all levels of the industry and research based innovation.

The key education and training elements for the 2006–2009 period are therefore:

- continued building of educational partnerships between industry and Government including in regional Victoria
- improving career pathways
- promoting industry recruitment and retention.

Building Education Partnerships

Industry, Government and education providers will continue to work together to help to make Victoria the State of Supply Chain Excellence and Gateway of Choice. The Victorian Department of Education and Training is a key stakeholder in this partnership.

The Victorian Learning and Employment Skills Commission (VLESC) determines State wide strategic directions and priorities for publicly funded Vocational Education and Training (VET) through extensive consultation with VET stakeholders to ensure education and training provisions meet current and future needs of industry.

In November 2005, as part of 'Moving Forward: Making Victoria the Best Place to Live, Work and Invest', the Government announced a new \$100 million Provincial Victoria Growth Fund to assist regional communities capture opportunities for economic growth.

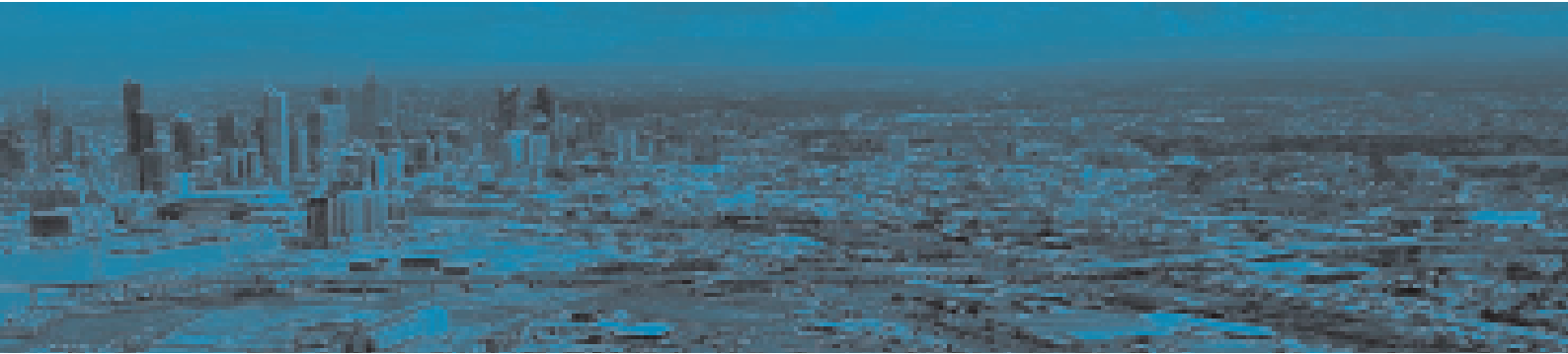
Two key elements of this initiative that support TDL industry education and training in regional Victoria are:

- skills and jobs for disadvantaged workers that improve skills and secure work for disadvantaged job seekers in regional Victoria especially in manufacturing in western Victoria and transport and distribution in north-east Victoria
- new training opportunities in areas of high regional demand to significantly increase vocational education and training in skills critical to future regional economic growth including transport and distribution.

The TDL industry must also engage the broader Victorian business community so that senior management better appreciates the role of TDL in the success of their business and the importance of education and training. This broadening of the partnership into the TDL customer base is essential for sustained innovation and growth of the Victorian economy.

Over the next four years the industry-Government partnership will support:

- Government-funded training to the TDL industry consistent with the VLESC identification of the industry as a high priority training area
- articulation of qualifications between educational institutions and levels as a key focus for all VET stakeholders
- RRTs to promote and coordinate TDL industry involvement in the Government's two new regional training programs
- the Education and Training PRG to promote greater awareness and understanding of supply chain issues at CEO and senior management levels of Victorian enterprises.



Improving Career Pathways

In order for career planning and movement within TDL careers, recognition of skills/qualifications acquired and articulation between education providers, requires review and reform.

The Education and Training PRG has undertaken preliminary research and discussion to better define and explore this issue and to identify options.

Over the next four years the Education and Training PRG will assist in establishing:

- supply chain career and education pathways that incorporate recognised prior learning
- a framework for promoting articulation between educational institutions
- a clearer understanding by educational providers of industry training needs.

Supply Chain Logistics Career Map

The Supply Chain Logistics Career Map promotes the industry as an attractive career option for young people and existing workers wishing to broaden their career pathways. It is a guide to the wide range of job and career opportunities available within the industry, indicates industry entry points, levels of work experience, education and training requirements, salary ranges and provides a list of key contacts. It is an important guide to career pathway choices.

It is distributed to key stakeholders in the Victorian education and training system, including Victorian Government secondary schools, TAFE institutions, Local Learning and Employment Networks and the broader community.

Over the next four years the Education and Training PRG will:

- improve and extend the Career Map
- explore ways to make the Career Map available on-line through an interactive web site
- promote projects to disseminate industry careers and education information to a wider audience.

TDL Industry Careers Days

The Victorian TDL industry showcases career opportunities in TDL through industry careers days.

These events highlight career opportunities in TDL to diverse audiences including career advisers, teachers, new apprenticeship centres and Local Learning and Employment Network personnel.

Over the next four years the TDL IRT and the Education and Training PRG will:

- work with education providers through careers days, expos etc to increase demand for training and education places in TDL
- support industry careers days
- contribute to relevant careers expos.

Recruitment of new graduates (secondary and tertiary) and young professionals, including more women, from other industries and retention of existing TDL workers will ensure the appropriate quantity and quality of skills within the Victorian TDL industry.

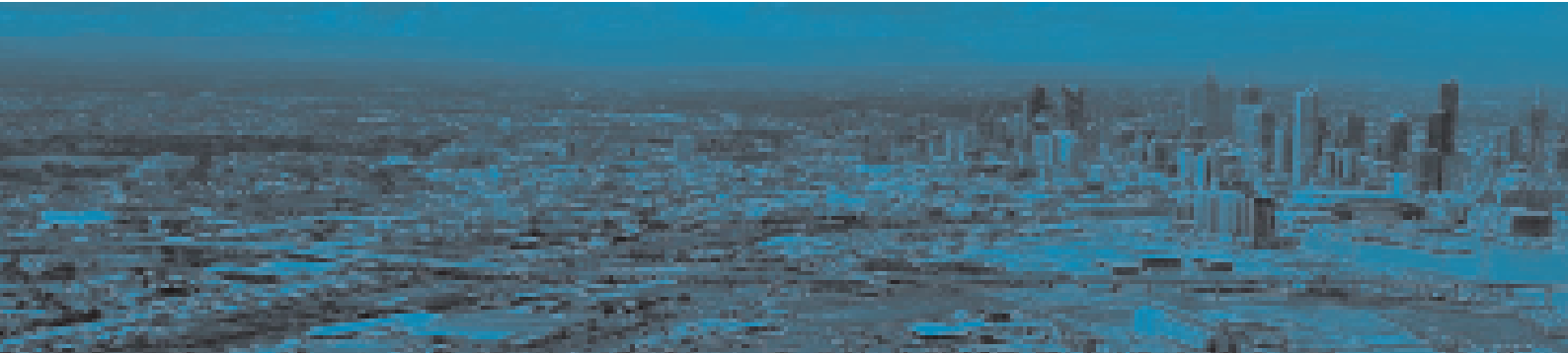
However, the industry faces three challenges in attracting and retaining workers:

- skilled labour shortages being experienced across the Australian economy
- the characteristics of the TDL workforce that is ageing and male dominated
- work in the TDL industry often being as a result of chance and for many a second career choice.

Recruitment

Priority actions for the recruitment of workers in the industry include information and marketing to secondary school students about the professional nature of the TDL industry and to identify education pathways that will:

- attract secondary school leavers into TDL-focused tertiary education
- attract new entrants to the industry.



Over the next four years the Education and Training PRG will:

- identify means and develop education pathways to attract secondary school leavers to the TDL industry
- provide advice in establishing a recruitment program in Victorian secondary schools
- build a shared vision among industry and education organisations to present a common message to prospective and current participants in the industry.

Development of Young Supply Chain Professionals

The Next Generation PRG is a group of young professionals working in logistics and supply chain addressing the particular challenges facing young TDL professionals and specific programs needed to professionally develop and retain young professionals in the industry.

It provides TDL and Government decision-makers with insights into the opinions and experiences of young people across a range of TDL sectors, offers fresh perspectives on business and technology issues and creates new possibilities for industry-Government partnership programs.

Through the Next Generation PRG, young TDL professionals have an opportunity to have their say on future developments in the industry.

There is a pressing need to develop new means of attracting young people into the industry either through the professions or from secondary and tertiary education. The Next Generation PRG provides unique and innovative perspectives on the career paths and opportunities available in the TDL industry to young professionals and on effective means of attracting them to the industry.

Over the next four years the Next Generation PRG will:

- pursue partnerships with educational institutions to advise on the design, content and delivery of courses
- investigate (with the Education and Training PRG) new education programs to ensure education meets the changing requirements of logistics and supply chain professionals
- further promote and foster the TDL mentoring program.

Attracting Women to the TDL Industry

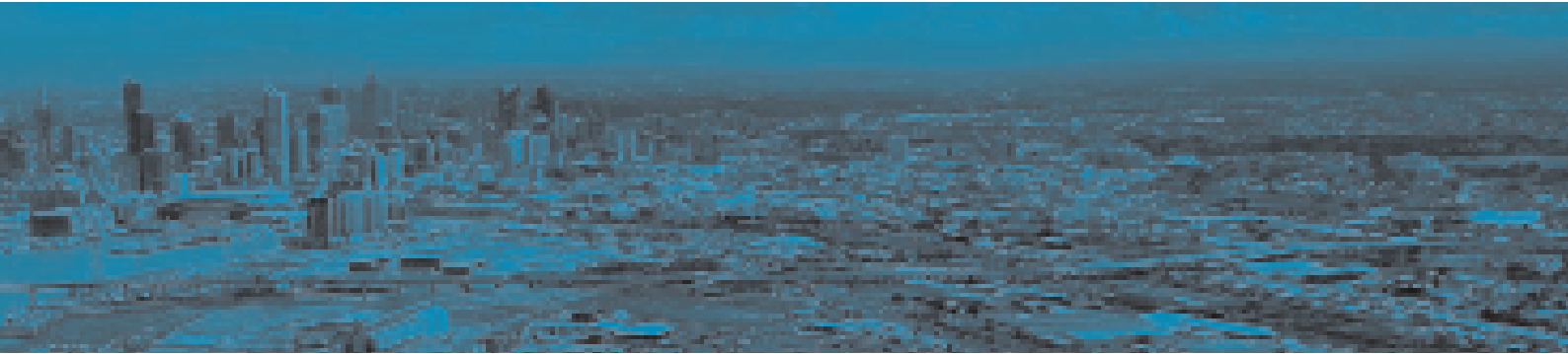
The Women in Supply Chain PRG was created to assist women in the TDL industry and to support their continuing involvement.

Because women are a small but significant minority in the industry it was recognised that there is a need to provide networking opportunities and to support women once they have entered the industry. Such support is likely to be essential in retaining women in the TDL workforce.

It is recognised also that because of the tight recruitment market and growing skills shortages in many TDL sectors and the image of the industry as male dominated, that attracting more women to the industry may be difficult. It is important to communicate the professional nature of the industry and the wider opportunities and benefits to women of a career in TDL.

Over the next four years the Women in Supply Chain PRG will:

- support networking for women working in the TDL industry
- assess the particular education and training needs of women who wish to join the TDL industry
- investigate and promote the key factors influencing women's decisions to enter the TDL industry.



3.4 Supply Chain Efficiencies

An integrated, seamless flow of freight along the whole supply chain is critical to industry, enterprise and regional competitiveness. But there is a lack of industry awareness, understanding and take-up of the philosophy behind and practices necessary for supply chain excellence.

At the same time one of Victoria's major economic strengths in facilitating this seamless flow of freight is its infrastructure – its ports, airports and road and rail systems. Reducing impediments around this infrastructure through management of traffic congestion, increasing the use of rail for freight, growing coastal shipping and building the use of intermodal hubs, including facilitating shuttle trains between hubs, is central to the efficiency and competitiveness of supply chains in Victoria.

The foundation that Victoria's freight infrastructure provides offers a solid basis for pursuing new opportunities and activities to increase the range and volume of TDL business.

These issues will be addressed through:

- taking strategic actions through the Freight Intermodal Efficiency (FIE) PRG
- dealing with supply chain impediments, with particular emphasis on increasing the use of rail and intermodal hubs
- exploring the establishment of a PRG to address the supply chain issues faced by freight owners/customers and logistics managers
- investigating opportunities for and the means to attract increased freight traffic to Melbourne Airport and the Port of Melbourne
- promoting Intelligent Transport Systems
- benchmarking and collaboration with and between TDL businesses
- developing new opportunities through research and innovation.

Freight Intermodal Efficiency PRG

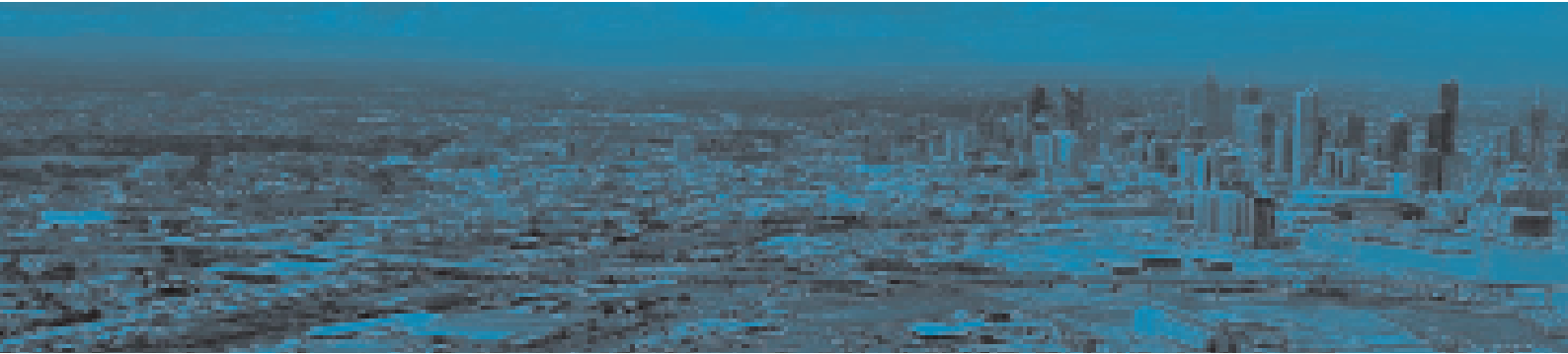
Over the next four years the Freight Intermodal Efficiency PRG will:

- promote intermodal awareness within the Victorian TDL industry
- support the effective development of operational intermodal hubs in Victoria
- support the development of container management systems
- support the development of port systems
- support change management projects such as the Business Activity Harmonisation Study and follow up work arising from them
- contribute to infrastructure planning particularly in identifying resources required for development of and access to capacity, including land around air, rail and sea facilities, distribution centres and rail access to those centres and hubs
- gain a deeper understanding of the operation of intermodal terminals from the perspective of the users and the operator
- work with companies to increase effective use of their rolling stock, addressing unnecessary trips, empty back-loads and less than full loads
- develop task forces to address other identified issues and problems.

Addressing Supply Chain Impediments

The Business Activity Harmonisation Study (BAHS) is an extremely important first step in increasing supply chain efficiencies through organisational change around the Port of Melbourne. BAHS has made considerable progress and now needs to be supported in its further development and implementation stages. It has received considerable national and international attention as a leading, ground-breaking study.

BAHS is also a model for further research and innovation that is required to enhance supply chain efficiencies around other key Victorian freight and logistics infrastructure.



The Victorian Freight and Logistics Council is managing the Business Activity Harmonisation Study for the TDL Industry Round Table. The study addresses operational disconnects along port-related logistics chains through a long-term change management methodology. This has involved groups of industry participants identifying problems along the chain, testing assumptions then creating customised solutions for different types of business. Those who analysed the processes also implemented the changes.

Continuous learning and a rollout of related change management projects is essential to ensure the people who operate the systems implement the solutions to achieve increased competitiveness of the supply chain.

Over the next four years the TDL IRT will:

- support and participate in the full implementation of BAHS to promote key changes in Port of Melbourne supply chains
- investigate the feasibility of establishing similar projects in the domestic freight area.

Intelligent Transport Systems (ITS)

The application of information and communications technology, advanced electronics and computer technology through Intelligent Transport Systems can significantly enhance the safety, efficiency and environmental performance of transport systems.

The National Intelligent Transport Systems Centre was established early in 2006 as a key partnership between industry and Government fashioned through the TDL Action Plan. Its role will be to assist in increasing the productivity of the TDL sector and strengthening Victoria's international competitiveness.

Over the next four years the Business Systems PRG will collaborate with Intelligent Transport Systems Australia to identify and pursue opportunities to address:

- traffic congestion in Melbourne and Victoria through real time traffic information and automation of freight matching
- vehicle safety and efficiency through innovative vehicle technologies

- the use of alternative vehicles and smart technologies in supply chain solutions
- possible collaboration with the Radio Frequency Identification (RFID) Association of Australia.

Benchmarking and Collaboration

There is an ongoing need to assemble and disseminate information about supply chain practices and optimisation strategies through TDL partnership networks to enhance the understanding of current and emerging supply chain strategies and best practices.

This work was commenced through the TDL Action Plan and will be continued in the SCE Action Plan through whole-of-industry benchmarking programs.

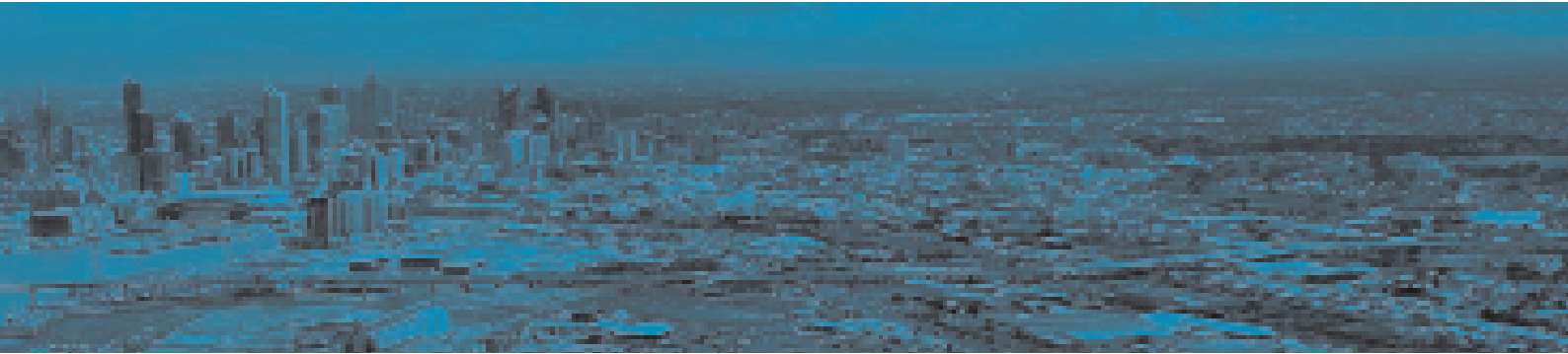
Benchmarking, collaboration and logistics frameworks provide companies with clear performance measures and standards to improve business practice such as those provided through the 'Cold Chain Guarantee'. They also provide industry and Government with a reference point to model and prioritise improvement and guide industry and business development.

Transport Company Benchmarking Study

The Transport Company Benchmarking Study (TCBS) benchmarks transport companies' use of supply chain technologies, initially involved more than 50 Victorian transport SMEs and is delivered through a partnership involving the TDL IRT, RRTs, the Business Systems PRG, the VTA and the Victorian Government.

As well as providing information to participating companies on their use of supply chain technologies within and between companies the study also provides outputs for the wider industry including:

- a DVD showcasing excellence in four Victorian transport companies providing a basis for broader industry benchmarking and improvement
- a report directed at software vendors on software solutions they can provide for their transport SME client base while improving the interoperability of computer-based business systems.



Over the next four years the industry-Government partnership will:

- further develop and implement whole of industry business benchmarking programs
- extend the Transport Company Benchmarking Study to showcase new ICT technology and to benchmark industry best practice
- review the Australian Logistics Assured Program.

Research, Innovation and Investment

Economic, social and technological changes impacting on the TDL industry and supply chain strategy are occurring rapidly. Innovation in supply chain optimisation strategies and techniques is central to economic competitiveness and basic and applied research are key contributors to innovation.

Over the next four years the industry-Government partnership will contribute to the body of knowledge on supply chain by fostering research into and the pursuit of new TDL opportunities, strategies and techniques and demonstration of their application including:

- developing insights into current and emerging supply chain optimisation strategies and techniques to achieve Triple Bottom Line outcomes
- supporting the establishment of a Cooperative Research Centre focused on supply chain and logistics
- drawing upon lessons from the International Traceability Project
- extending insights gained from BAHS
- investigating and pursuing the potential of coastal shipping in enhancing Victorian supply chains
- pursuing innovation in supply chain management through sponsored practical research, case and comparative studies and demonstration projects
- attracting companies to invest in Victoria by demonstrating the strength of Victoria's supply chains.

3.5 Government and Regulation

Regulation and compliance play an important part in overall supply chain efficiency. Compliance issues such as mass limits, vehicle design, road design and upgrading, vehicle safety and use of new vehicle technology are of particular importance. In addition to road transport related regulation, business will be impacted upon by regulations relating to access, pricing, security, licensing, chain of responsibility, chain of custody (food), bio-security, state-based regulators in relation to ports, land-use and planning, as examples.

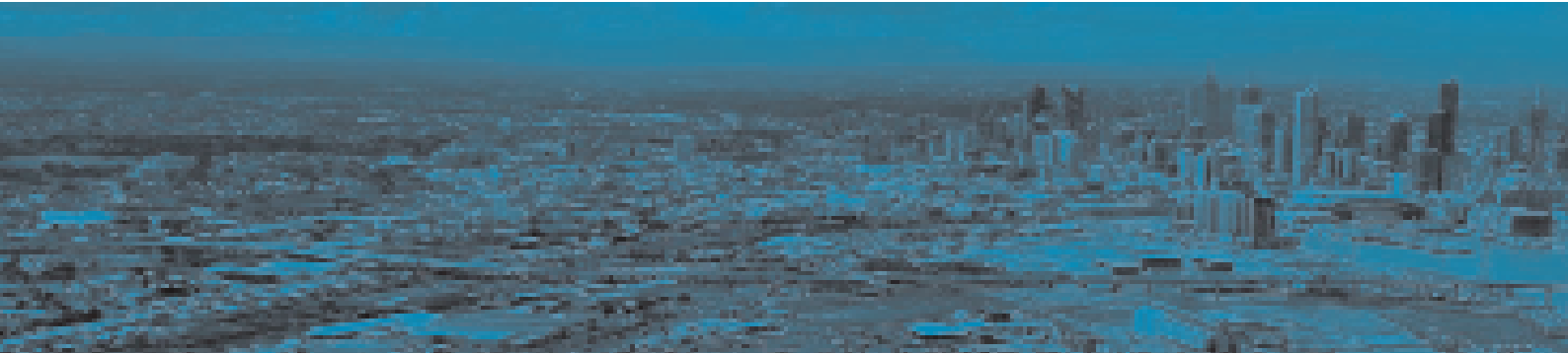
The Department of Infrastructure and its agencies, and the Federal Department of Transport and Regional Services (DOTARS) are largely responsible for regulation in the TDL industry, although some other Departments are also involved. The regulations and their acceptance by the industry are the concern of the regulators and are not specifically considered here.

With vehicle design reaching the upper limits of size and mass, boosting productivity while managing Triple Bottom Line principles requires increased focus on human resources management, education and training, inter-government cooperation and legal reform.

Chain of Responsibility legislation, for example, highlights the interconnection between supply chain efficiency, productivity, regulation and the law.

Work at a national and state level continues to move towards the harmonisation of regulations between states and across the nation.

Facilitating dialogue, interaction and understanding between the Victorian TDL industry and the regulators is central to the effectiveness of the regulatory framework and enhancing supply chain efficiency.



Over the next four years the TDL Industry Round Table will:

- support consistency and harmonisation of standards and regulatory arrangements to avoid impediments to efficient freight movement
- support integrated risk management systems to assist industry, particularly small and medium sized enterprises, to manage security effectively
- identify the impact of regulations and assist industry take-up
- assist the flow of information from industry to the regulators to ensure that regulations recognise the needs of industry and can be introduced without unnecessary burdens on freight customers and their supply chain partners.

3.6 Marketing and Promoting Supply Chain Excellence

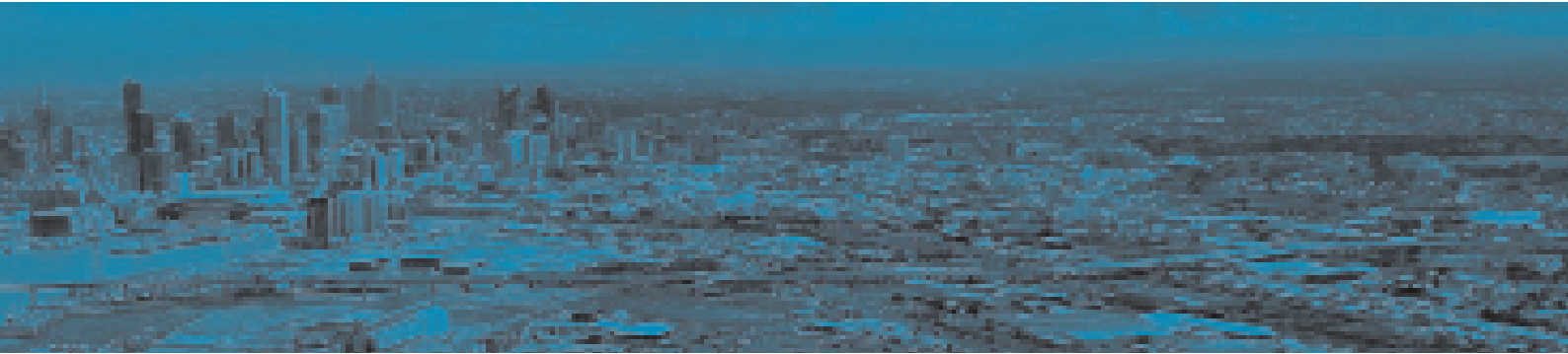
A key challenge in pursuing supply chain excellence is the broad lack of knowledge and misperception of the TDL industry within the community. Most Victorians do not know how large and economically important it is. Many see it in terms of trucks, trains and ships and as a 'blue singlet, low technology' industry.

Government and industry need to increase community awareness and understanding of the role and importance of the TDL industry and its fundamental importance to supply chain capability through an ongoing marketing campaign communicating that TDL is:

- integral to the smooth running of the business and commerce of the State
- economically significant in creating jobs and wealth
- modern, forward looking and technologically driven
- fundamental to supply chain excellence.

A marketing campaign is required to promote Victoria as the State of Supply Chain Excellence and the Gateway of Choice by:

- highlighting this supply chain excellence to domestic and international businesses, suppliers and customers
- building awareness of career opportunities in TDL among school leavers, tertiary graduates, women and people not usually connected with the industry
- raising awareness of the importance of supply chain excellence and education and training within the industry itself
- highlighting key initiatives and projects undertaken and successes achieved.



A marketing and communications campaign will ensure key messages reach the broader community and specific target groups with sufficient clarity and frequency to have a lasting impact on the public's knowledge and perceptions of the industry.

An effective marketing campaign requires a professional approach based on planning and strategic interventions that will inform targeted audiences and influence their attitudes and behaviour toward the TDL industry.

In formulating an integrated approach to marketing Victoria as the State of Supply Chain Excellence, the following priority areas will need to be addressed over the next four years.

The TDL Industry Round Table will play a key communication role by:

- supporting, contributing to and participating in events, activities and initiatives of other organisations, particularly those represented on the TDL IRT
- showcasing excellence through a series of 'media friendly' case studies on CD ROM and DVD to promote best practice and reward innovation in the industry
- considering a strategic communications plan to improve understanding and awareness of the TDL industry among key opinion makers in Government, industry and the media
- providing an industry point of view on the marketing of the TDL industry to marketing professionals responsible for a marketing campaign
- supporting a drive for a public information campaign using print, radio and the Internet to credibly present and position the industry.

3.7 National TDL Agenda

Victoria's TDL industry operates within a national and global context.

Government and industry must therefore pursue supply chain excellence both within and beyond Australia's state and national borders.

Victoria has been leading the way in developing and implementing national and international supply chain initiatives and will continue to do so.

The Victorian Government and TDL industry will cooperate with State and Federal Governments in addressing important issues affecting Customs, AQIS and national security, as well as projects sponsored through DOTARS.

Over the next four years the TDL industry-Government partnership in Victoria will:

- maintain links with other states through the Integrated Logistics Network and the Australian Freight Councils Network and other national networks
- build on links with the Australian Logistics Council
- ensure TDL issues involving Customs, AQIS and national security are addressed
- build interstate TDL industry links through joint projects with other states and territories e.g. rollout of Transport and Logistics Centre (TALC) programs.

4: Action Agenda

2006–09 Supply Chain Excellence Action Plan

The following projects are detailed to guide future action. The factors affecting this industry are fast moving and therefore over the next four years the partnership will need to respond in ways that cannot be entirely foreseen.

Within this context it is clear the Government and the TDL industry have made commitments to work together and the following chart (Supply Chain Excellence Action Plan Agenda) lists the nature and substance of the agreed directions. While many of these issues require commitment of time and energy by both industry and Government, a number will additionally require the securing of funds for implementation. The specific responsibilities of both parties to support that agenda are set out below.

TDL Industry Role

The TDL Industry Round Table (TDL IRT) will oversee the industry commitment to the actions set out in this Plan.

The TDL Partner Reference Groups will address relevant issues and report through the TDL IRT to the VSCCG.

The TDL Regional Round Tables will focus on issues that they identify as priorities for their regions and will report through the TDL IRT to the Victorian Supply Chain Consultative Group.

Role of the Department of Innovation, Industry and Regional Development

The role of the Department of Innovation, Industry and Regional Development in supporting and facilitating TDL industry growth and transformation will be guided through its vision and strategy to reinforce and complement the key elements of this Action Plan.

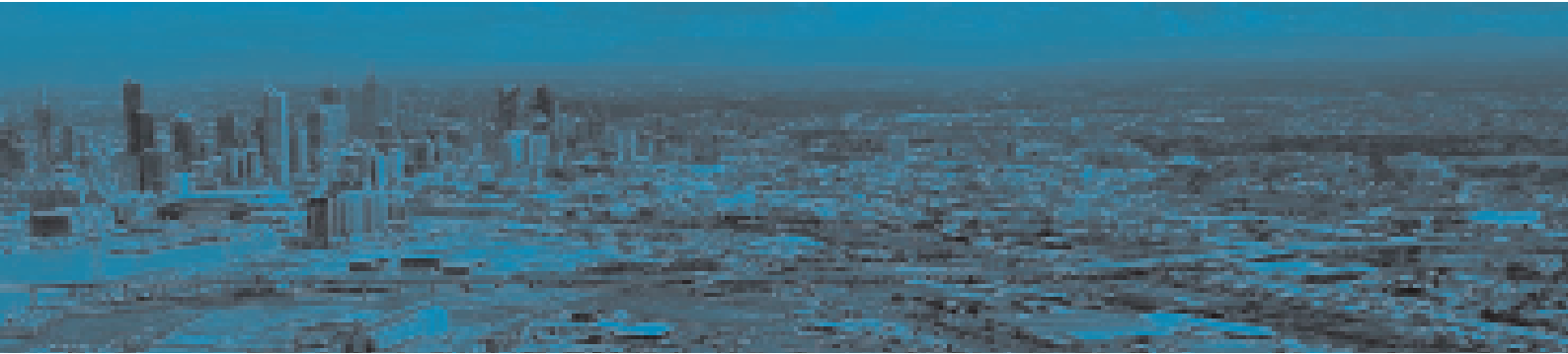
The Department recognises the dynamism and complexity of the environment in which Supply Chains and the TDL industry operate. Therefore, one of its primary roles will be to continuously monitor and review emerging industry trends in order to effectively:

- mobilise resources to assist in addressing strategic TDL industry issues and facilitate access to key resources
- advocate industry interests and needs to all levels of Government and to the community.

The Department will also act as the primary Government link for all industry-Government partnership projects canvassed in this Plan. It will be the lead agency for most of these projects. Where other State and Federal agencies are involved, the Department will negotiate roles with them.

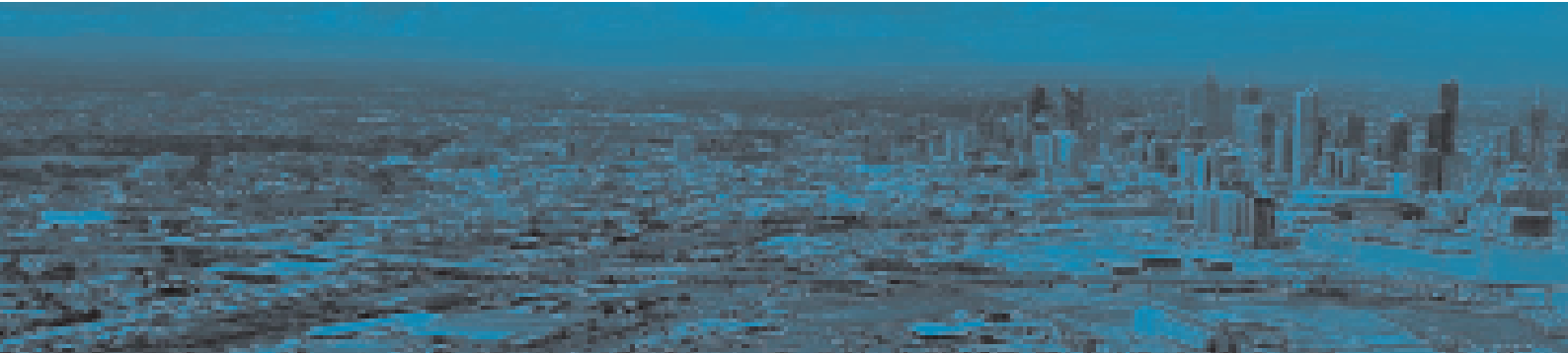
The Department will, within its budget and resources, specifically commit to the following as part of this Plan:

- administering two Victorian Supply Chain Consultative Group meetings per year
- ensuring that the TDL IRT and the PRGs and RRTs have administrative support
- administering a Supply Chain summit each year
- seeking funding for projects
- monitoring and evaluating projects undertaken with DIIRD funding
- managing where appropriate whole of government support for TDL projects
- working to advance the national TDL industry agenda.

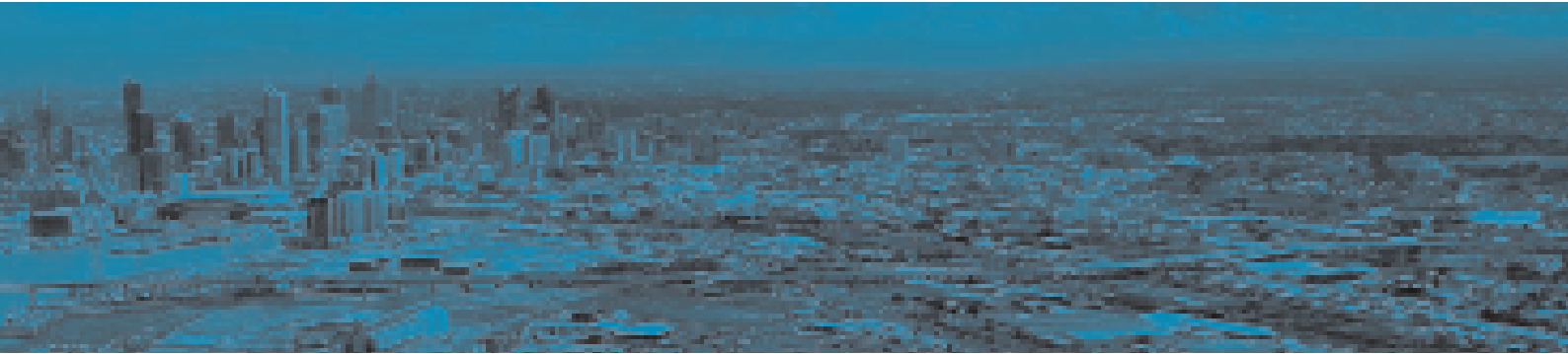


Supply Chain Excellence Action Plan Agenda

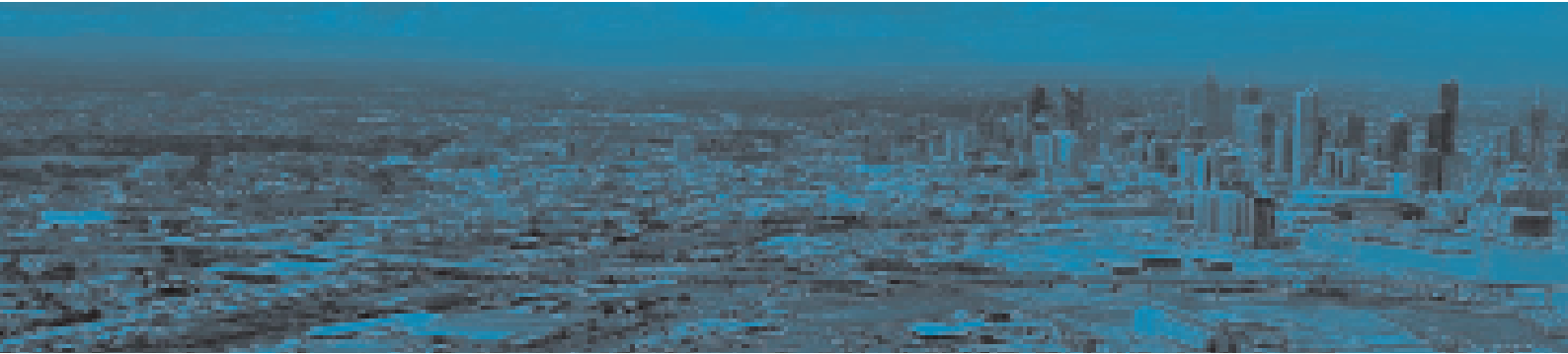
Initiative	Ongoing TDL objectives	Supply chain projects
1 Partnerships	<ul style="list-style-type: none"> Support and enhance the operations of the TDL industry-Government partnerships established as the VSCCG, the TDL IRT, the PRGs, and the RRTs Provide leadership in securing Victoria as the state of 'Supply Chain Excellence and the Gateway of Choice' Encourage the involvement of the TDL industry in a wide range of projects, particularly those in partnership with Government 	<ul style="list-style-type: none"> Refine and extend Partner Reference Groups and membership (eg: Freight Owners and Logistics Managers) Fully utilise skills and expertise of members Review governance and procedures of partnership groups Coordinate and focus PRGs and RRTs Review and manage projects and work plans Initiate and provide input into strategic projects and proposals Address key issues within TDL industry including business systems, education and training and supply chain impediments Establish directions for regional TDL industry including key infrastructure and skills gaps Involve industry partners in TDL agenda Identify and pursue opportunities for partnerships between industry associations and Government Link into the national TDL agenda
2 Organisational and ICT business systems	<ul style="list-style-type: none"> Investigate business system needs Increase ICT uptake in TDL Support global standards Support development of ICT skills Support Smart Freight initiative 	<ul style="list-style-type: none"> Identify new business systems and technologies appropriate to Victorian TDL Investigate means of encouraging uptake of new systems and technologies Develop new case studies and benchmarking on business systems Encourage and facilitate uptake and implementation of business systems and technologies especially for SMEs, particularly through the SME PRG Facilitate harmonisation of standards Support development and adoption of global standards Encourage interoperability Encourage common/single window/portal Collaborate with others Harness experiences of New Skills Program Improve understanding of how to best update IT skills Support and actively participate in implementation of Smart Freight Project



Initiative	Ongoing TDL objectives	Supply chain projects
<p>3 Education and training</p>	<ul style="list-style-type: none"> • Build education partnerships between industry and Government • Improve career pathways • Promote recruitment and retention • Support research in TDL • Attract women to the TDL Industry 	<ul style="list-style-type: none"> • Government funding of TDL training increased as a priority area • Focus on articulation between institutions • Pursue regional education and training initiatives • Promote awareness of supply chain issues amongst CEOs and senior management • Assist in establishing: <ul style="list-style-type: none"> • Pathways that incorporate Recognised Prior Learning • Framework for promoting articulation • Clearer understanding by education institutions of Industry training needs • Improve and extend Career Map • Explore ways of making Career Map available on-line • Support Industry Careers Days and other careers expos • Work with education providers to increase demand for training places in TDL • Develop pathways to attract secondary school leavers to TDL • Advise on a TDL industry recruitment program for secondary schools • Facilitate and participate in task forces on skill shortages • Develop shared message for prospective workers about Industry • For Next Generation PRG: <ul style="list-style-type: none"> • Pursue partnerships with educational institutions to ensure courses are relevant • Foster mentoring program • Investigate new education programs that meet needs of logistics and supply chain professionals • Support the development of a CRC in supply chain and logistics • Encourage take-up of research into TDL issues by tertiary education institutions • Assess the particular education and training needs of women who wish to join TDL • Investigate and address key factors influencing women's decisions to enter TDL • Support networking by women in TDL industry



Initiative	Ongoing TDL objectives	Supply chain projects
<p>4 Supply Chain Efficiencies</p>	<ul style="list-style-type: none"> • Strategic action by Freight and Intermodal PRG • Address supply chain impediments • Promote Intelligent Transport Systems • Undertake benchmarking and collaboration • Promote research innovation and investment 	<ul style="list-style-type: none"> • Promote awareness and development of intermodal hubs and greater use of rail • Support change management projects such as BAHS • Support development of container management systems • Contribute to infrastructure planning by identifying land for development of intermodal capacity • Collaborate to ensure effective use of rolling stock • TDL IRT support and participate in implementation of BAHS project to promote changes to Port of Melbourne supply chains • Investigate feasibility of BAHS like project in domestic freight • Investigate means of increasing freight traffic to Melbourne Airport and the Port of Melbourne • Collaborate with ITS Australia to address: <ul style="list-style-type: none"> • Traffic congestion in Victoria • Vehicle safety and efficiency • Use of alternative vehicles and smart technologies in supply chain solutions • Continue to develop and implement whole-of-industry Benchmarking Programs • Extend Transport Company Benchmarking Study • Review Australian Logistics Assured program • With the TDL IRT: <ul style="list-style-type: none"> • Investigate supply chain optimisation for Triple Bottom Line • Develop lessons from International Traceability Project • Extend insights from the BAHS Project • Investigate and pursue the potential of coastal shipping in Victorian supply chains • Pursue supply chain innovation through research, case studies and demonstration projects • Attract companies to invest in Victoria by demonstrating the strength of Victoria's supply chain



Initiative	Ongoing TDL objectives	Supply chain projects
5 Government and regulation	<ul style="list-style-type: none"> • Support harmonisation • Support integrated risk management systems • Assist information flow between industry and regulators 	<ul style="list-style-type: none"> • Support consistency and harmonisation of standards and regulatory arrangements • Support integrated risk management systems to assist industry to manage security • Assist flow of information between industry and the regulators so regulation recognises industry needs and they are not a burden and assist industry take-up
6 Marketing and promotion	<ul style="list-style-type: none"> • TDL IRT communication activities 	<ul style="list-style-type: none"> • Support and participate in initiatives of other organisations • Showcase excellence through media friendly electronic case studies demonstrating TDL best practice and innovation • Consider strategic communications plan to improve awareness and understanding of TDL among key opinion makers • Provide industry point of view on marketing TDL industry • Support a drive for a public information campaign to present and reposition TDL industry
7 National TDL Agenda	<ul style="list-style-type: none"> • Links with States • Australian Logistics Council • Customs, AQIS etc 	<ul style="list-style-type: none"> • Maintain links with States and Federal Government through Integrated Logistics Network and Australian Freight Councils networks and rollout of Transport and Logistics Centre programs • Build links with Australian Logistics Council • Engage Customs, AQIS etc

Abbreviations and Acronyms

AFCN	Australian Freight Councils Network www.freightcouncils.com.au	ILN	Integrated Logistics Network
AFFA	Department of Agriculture Fisheries and Forestry (Commonwealth) www.affa.gov.au	Next Gen PRG	Next Generation Partner Reference Group
ALA	Australian Logistics Assured	PoMC	Port of Melbourne Corporation www.portofmelbourne.com
ALC	Australian Logistics Council www.ozlogistics.org	RFID	Radio Frequency Identification
AQIS	Australian Quarantine and Inspection Service www.aqis.gov.au	SME PRG	Small and Medium Enterprise Partner Reference Group
BAHS	Business Activity Harmonisation Study see VLFC web site: www.vlfc.com.au/html/default.asp	TALC	Transport and Logistics Centre www.talc.com.au
BizSys PRG	Business Systems Partner Reference Group	TDL	Transport, Distribution and Logistics
DET	Department of Education and Training www.det.vic.gov.au/det	TDL IRT	Transport, Distribution and Logistics Industry Round Table www.supplychainvictoria.com.au
DEST	Department of Education, Science and Training (Commonwealth) www.dest.gov.au	VAC	Victorian Airfreight Council www.australianairfreight.com/vac
DIIRD	Department of Innovation, Industry and Regional Development www.diird.vic.gov.au/homepage Business Victoria – www.business.vic.gov.au	VFLC	Victorian Freight and Logistics Council www.vlfc.com.au/html/default.asp
DOI	Department of Infrastructure www.doi.vic.gov.au	VLESC	Victorian Learning Employment Skills Commission www.vlesc.vic.gov.au/vlesc
DOTARS	Department of Transport and Regional Services (Commonwealth) www.dotars.gov.au	VSCCG	Victorian Supply Chain Consultative Group
FIEG	Freight Intermodal Efficiency Partner Reference Group	VTA	Victorian Transport Association www.vta.com.au/default.asp
GS1	GS1 – formerly EAN Australia www.gs1au.org/_home.asp		
ICT	Information and Communications Technology		

Appendices

Appendix A: Generic List of Companies Involved in Supply Chains

Freight Owners

Suppliers

Exporters (Metro & Regional)

Importers (Metro & Regional)

Retailers/Wholesalers

Manufacturers

Freight Transport Companies – Trucks, Small Vans and Couriers

Rail Operators

Rail Access Management

Shipping Lines

Shipping Agents

Air Freight Companies (and Airlines in general – which carry freight underbelly)

Stevedores

Freight Forwarders

Customs Brokers

Container Park Operators

Reefer Services

Container Maintenance

Inter modal Hub Operators (Metro and Regional)

Warehouses, Cool Stores and Distribution Centres

Air and Sea Port Authorities and Agencies

Government Departments, State and Federal (eg DOI, DET, DIIRD, DOTARS)

Customs

AQIS

Intelligent Transport System Specialists

Information Communication and Technology Companies

Logistics and Supply Chain Consultants

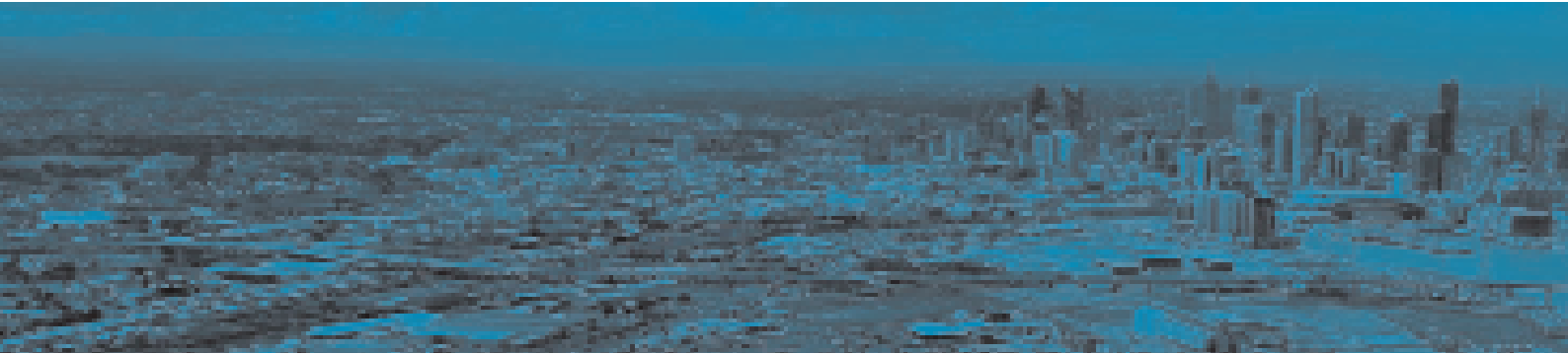
Industry Associations

Unions

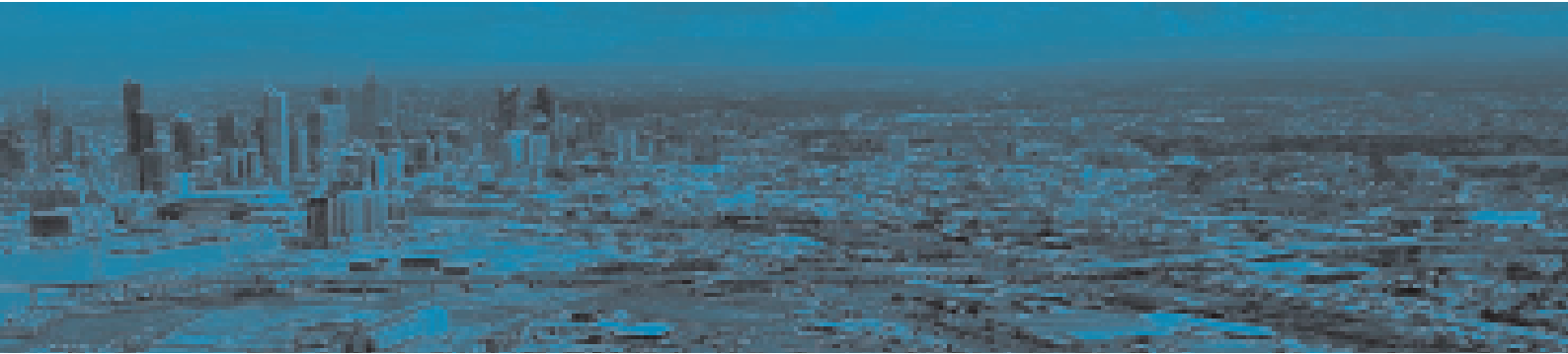
Investors & Financiers

Appendix B: 2002-05 TDL Industry Action Plan Outcomes

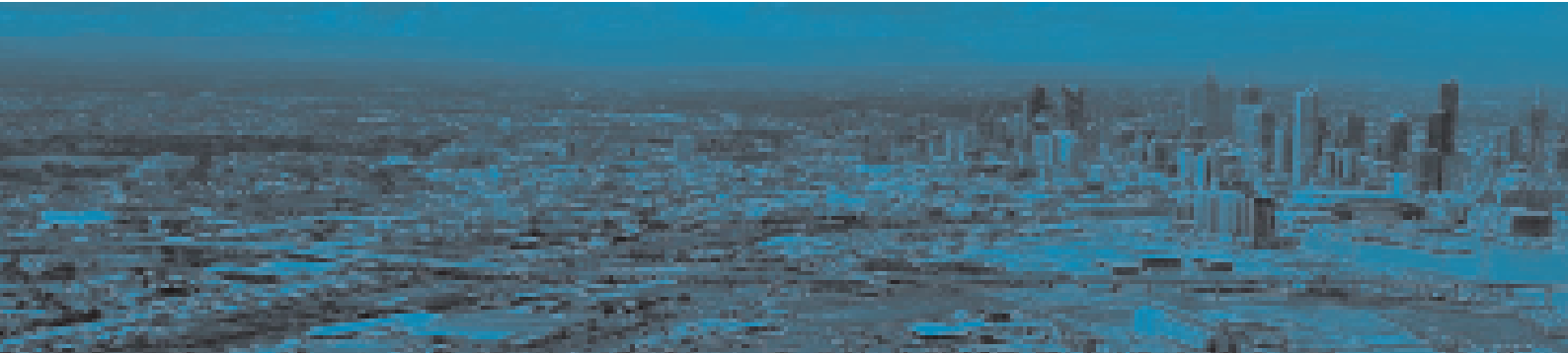
Initiative	Action	Stage 1 Complete	Ongoing	Future Action	Other Comments
Strengthen Consultative Mechanisms	Establish Victorian Supply Chain Consultative Group (VSCCG)	✓			
	Establish Industry Round Table (TDL IRT)	✓			
	Establish relevant Partner Reference Groups	✓	✓	Establishing regional PRGs, SME PRG & Inbound logistics PRG	
	Press for Government contributory funding to Air and Sea Freight Councils	✓	✓	VFLC & VAC	
Improve Supply Chain Practices	Undertake supply chain benchmarking of Victorian companies	✓	✓	Promote findings and the 'Next Steps' Transport Company Benchmarking Study	
	Undertake supply chain collaboration projects to demonstrate best practice	✓		Promote the findings	
	Set up quick analysis of supply chain practices on web site	✓			Setting up the model indicated the costs outweighed benefits
	Undertake value chain workshops for supply chain partners	✓			
	Ensure relevance of Government business support programs to TDL	✓	✓	ALA and the 'Next Steps' Transport Company Benchmarking	
	Coordination of an annual Supply Chain Summit for participants	✓			2004 Summit (384 participants) 2005 Summit (396 registrations)
Increase the uptake of ICT and e-commerce	Facilitate ICT demonstration projects harnessing ECEPP	✓			
	Facilitate training in ICT to SMEs	✓	✓	DET emerging industries skills training program	



Initiative	Action	Stage 1 Complete	Ongoing	Future Action	Other Comments
	Harness the Roadshow Program to provide ICT training to regional TDL enterprises	✓			
	Support the development of interoperable ICT systems	✓	✓	Smartfreight Biz Sys PRG 'Next Steps' Transport Company Benchmarking Study	
Strengthen Education and Training	Review industry advisory arrangements	✓			
	Undertake a training needs analysis for the TDL industry	✓			OTTE Strategic Audit
	Map TDL career path linkages between vocational and tertiary courses	✓	✓ Stage 2 – to be developed as a web application		Stage 1 – Career Map launched June 2005
	Promote lifelong learning and career pathways in logistics and supply chain management	✓	✓	TDL IRT Mentoring Program	Education and Training PRG
	Facilitate an increase in education and training opportunities in logistics and supply chain management in Victorian Universities and TAFE, the vocational sector and the training sector	✓	✓		Example: VU Centre of Supply Chain & Logistics Excellence launched May 2005
	Maximise opportunities for credit transfer and articulation between VET qualifications and higher education courses in logistics and supply chain management	✓	✓	Education and Training PRG – work in progress	
	Support Federal Government Action Agenda initiatives	✓	✓		Member ALC People Group and ISWG; & the ILN
	Enable articulation of VET qualifications to University courses in transport, logistics and supply chain management		✓	Education and Training PRG – work in progress	



Initiative	Action	Stage 1 Complete	Ongoing	Future Action	Other Comments
Facilitate Transport Development and Connectivity	Establish a systematic assessment model for intermodal hub proposals		✓		Review and reassessment required
	Establish criteria for Government support of intermodal hub proposals		✓		VFLC/FIE Intermodal Awareness Campaign
	Safeguard resources for intermodal hubs		✓	Work in progress	
Marketing the Victorian TDL Industry	Undertake a targeted marketing program to promote Victorian TDL capability	✓	✓	VSCCG/Summits Case Studies Promotional DVDs Access Melbourne Alliance	
	Leverage marketing of Victoria's manufacturing industry image to young people to include careers in SCM and logistics	✓			Office of Manufacturing Career study assisted formation of the TDL Supply/Demand Model
	Market careers in the TDL industry to students through secondary schools and in post-secondary and tertiary institutes		✓	Freight Week (Careers Day) VTA promotions CILTA Careers Fair	
	Explore the development of a website for Victoria as the State of Supply Chain Excellence	✓			www.supplychainvictoria.com.au Launched June 2005
	Promote our capability in handling international freight through good SCM to new and potential investors, key exporters and importers by developing joint marketing strategies for Melbourne as an international gateway			✓	Marketing strategy being developed
Facilitating Victorian Government Initiatives	Support the development of a whole-of-Government Victorian Freight and Logistics Strategy		✓		Developed by DOI
	Build links with related National bodies and programs		✓		Australian Logistics Council (ALC) Integrated Logistics Network (ILN) Transport and Logistics Centre (TALC) Information Standards Working Group (ISWG) National Food Strategy (NFS)



Appendix C: TDL Industry Government Partnership Case Studies

Transport Company Benchmarking Study

In industries across the world leaders emerge whose product or service quality, price competitiveness, responsiveness and customer satisfaction represent industry best practice.

These enterprises provide a benchmark upon which others in the industry can adapt these best practices to their own operations to enhance their competitiveness.

In a large and complex industry like TDL, successful benchmarking requires a high level of commitment and cooperation between a wide range of stakeholders.

So it was with the Transport Company Benchmarking Study (TCB Study) in which a unique partnership of industry and Victorian Government produced invaluable and otherwise inaccessible information and insight into enhancing the effectiveness and interoperability of electronic and computer based business systems used in the TDL industry.

A unique TDL industry-Government partnership of the Victorian Transport Association which coordinated the involvement of 54 Victorian enterprises; the TDL Industry Round Table which developed the benchmarking concept and assisted in the coordination of the Study; the Business Systems PRG which developed the study methodology and worked with the IT companies involved; the RRTs that involved and motivated regional participants; and DIIRD which funded the whole exercise, produced remarkable outcomes.

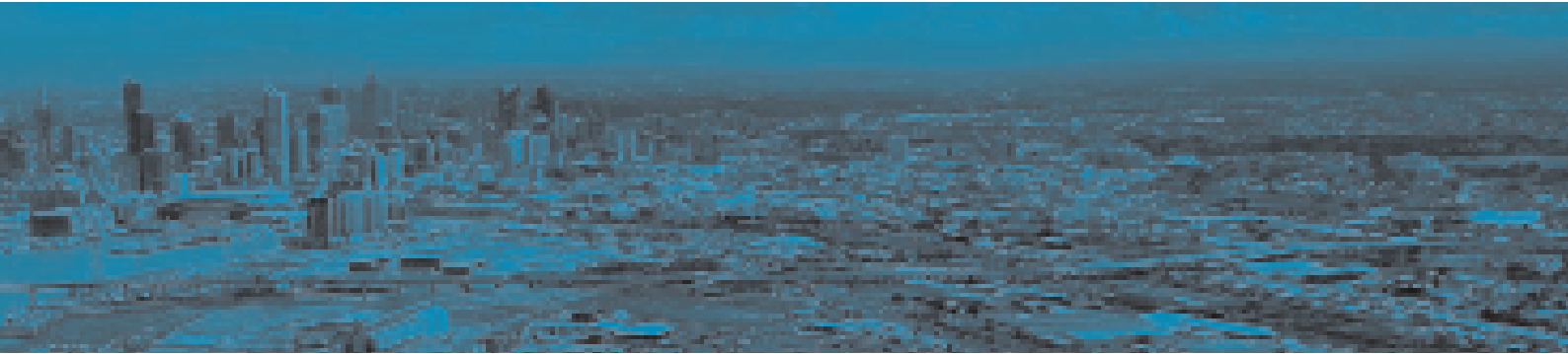
Through this partnership the TCB Study assembled and disseminated information on best practice and optimisation strategies for TDL electronic business systems. The Study provided benchmarking information for every one of the 54 participants, enabling them to identify the strengths and weaknesses of their electronic business systems and initiate targeted systems improvement and upgrade.

The Victorian TDL industry as a whole has also benefited through the production of a DVD demonstrating the systems and strategies of four best practice enterprises that provides a tool for broader industry benchmarking and improvement.

In addition the TCB Study partnership has documented information for providers of business systems software that enables them to better tailor their products to TDL industry needs.

A series of workshops involving transport enterprises and IT providers will disseminate and use the information and insights generated by the TCB Study to benchmark and improve electronic based TDL systems across Victoria.

These achievements enhancing and strengthening the competitiveness and capability of the Victorian TDL industry are possible only through the durability and quality of the unique partnership between the TDL industry and the Victorian Government.



Business Activity Harmonisation Study (BAHS)

BAHS is a sophisticated internationally recognised change management process aimed at radically reforming the operation of the supply chains in and around the Port of Melbourne (PoM).

The freight task of the Port of Melbourne, Australia's largest container port, has grown rapidly since the early 1990s. At the same time global competition and new logistics management practices have demanded that best practice operating systems and efficient supply chain practices prevail in the PoM. Increasing security demands, Customs requirements and Chain of Responsibility legislation have also added to the complex demands placed on the Port's supply chains.

However major longstanding operational disconnects and impediments along port-related supply chains have lead supply chain participants to develop techniques and strategies to work around these impediments without addressing the core problems.

Without comprehensive solutions to these impediments the global competitiveness and capability of the Port of Melbourne would be rapidly compromised and undermined.

The complexity and seriousness of this problem demanded unprecedented cooperation and collaboration between the TDL industry and the Victorian Government through the Freight Intermodal Efficiency Partner Reference Group.

This has been achieved through the unique BAHS partnership forged between the Victorian TDL industry and the Victorian Government, involving the Victorian Freight and Logistics Council, the Freight Intermodal Efficiency Partner Reference Group, the Department of Innovation, Industry and Regional Development and the Department of Infrastructure, the TDL Industry Round Table and industry groups including AFCN and ALC.

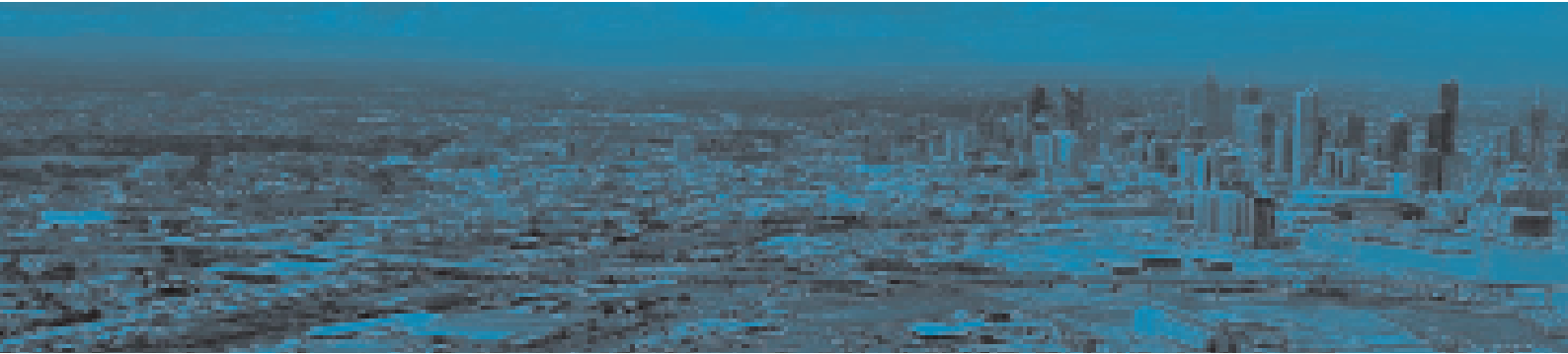
This partnership has been essential to the success of the BAHS as has the dynamic and innovative process of action research and change management that has characterised the conduct of the study.

BAHS (Stage 1) emphasised the need to unlock the knowledge and expertise of stakeholders in the Port of Melbourne logistics chain. Stakeholders were able to contribute their experience, perspectives and assumptions about the workings of the supply chain, generating through this action research 200 key issues that translated into six areas of focus, specifically:

- mismatch of working hours and wharf interface inefficiencies
- container management issues
- a need for holistic understanding of functions and practices or different links in the port related supply chain
- the pivotal role of shipping lines
- differences between commercial and operational relationships
- the use and effectiveness of information and communication technology.

This collaborative and inclusive approach continued into the solutions development stage (Stage 2) in which TDL industry members, involved and experienced in PoM supply chains, injected their experience and perspectives as industry experts to assist in filtering, refining, sorting and ultimately verifying assumptions, issues and possible solutions.

In September 2005 this powerful TDL industry and Government partnership took these issues and potential solutions to the national arena (Stage 3) at a National Plenary held as part of the Freight 2005 Congress and Exhibition in Melbourne.



The National Plenary, which was hosted by the Victorian Government, examined the BAHS work in detail considering key issues including:

- planning
- operations
- education
- interface including multi-party
- behavioural change
- IT solutions
- internal processes
- hours access
- policy and regulations.

This plenary of national stakeholders in the PoM not only validated the BAHS work to that stage and further refined understandings and potential solutions but also confirmed the leading edge status of the Study and its considerable interest to stakeholders in major ports worldwide.

The TDL industry-Government Partnership is now engaged in the most important stage (Stage 4) of implementing practical and targeted actions to address operational disconnections and impediments in port supply chains.

It is implementing four integrated supply chain Programs that will transform sea freight and landside systems to be world class in the long-term.

PoM efficiency, capacity and competitiveness is now being transformed through the collaboration of the TDL industry and Government in:

- strategic planning and development
- operations
- education and training
- information, communication and technology business systems.

This highly productive partnership between the TDL industry and Government in Victoria is central to ensuring that the Port of Melbourne remains Australia's primary port and Victoria as the Gateway of Choice.

About the Plan

The 2006–09 Victorian Supply Chain Excellence Plan is a joint initiative of the:

- Transport Distribution and Logistics Industry Round Table (TDL IRT)
- Victorian Department of Innovation, Industry and Regional Development.

Contact us

If you would like more information on the Action Plan or wish to learn more about Victoria's Transport, Distribution and Logistics industry please contact:

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The Australian Bureau of Statistics tracks two major sub groups of employment in the Transport, Distribution and Logistics industry. These are "Wholesale Trade" and the "Transport and Storage" categories ABS 6291.0.55.003 Labour Force, Australia, Detailed, Quarterly Table 05. Employed persons by State and Industry www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/6291.0.55.003 www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/6291.0.55.003

Australian Bureau of Statistics Cat No. 8155.0.55.003 Australian Industry Experimental Estimates Summary of Operations by ANZSIC Subdivision, States, Territories and Australia, 2002-03

