



Maritime Industry Capability and Capacity Report

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Background to the report

The maritime industry in the Northern Territory (NT), particularly in Darwin, is a sector with great strategic significance that is poised for continued expansion. As the natural hub for northern Australia's international engagement in the Indo-Pacific region, the industry plays an integral role in the region's economic infrastructure, offering services to a wide array of sectors. While freight, defence, oil and gas and border protection are some of the key sectors the industry encompasses, its reach extends far beyond these. The NT has five key ports located across the Top End that play a crucial role in exporting resources internationally and importing goods to support various industry sectors. In addition to this, the industry is a vital component in ensuring the supply of consumer goods to regional and remote areas.

Maritime infrastructure in the NT represents significant strategic value for Australia with natural deep-water advantages ideal for large vessels, such as at the Port of Darwin, Australia's most strategic port in the North. In addition to the significant existing infrastructure, investments in the maritime industry are being made that will fundamentally grow and reshape the requirements and capabilities of the region. Sustainable growth of the industry is critical to ensuring that the supply and capability of the NT maritime sector can support and optimise investment in, and the development of, the key major projects in the region. The importance of understanding the requirements of both industry and the government is critical to realising the potential of the maritime industry in the NT. Understanding these critical components paves the way for effective policies and strategies, fostering sustainable growth and development in the maritime sector.

Purpose of the Maritime Industry Capability and Capacity Report

The purpose of the *Maritime Industry Capability and Capacity Report* (the Report) is to:

- Understand the strengths, weaknesses, and characteristics of the NT maritime sector and how they influence capability and capacity to cater to current and future industry demand.

The knowledge and understanding gained from this Report will be instrumental in guiding potential future assessments and informing a maritime workforce strategy that will proceed it.

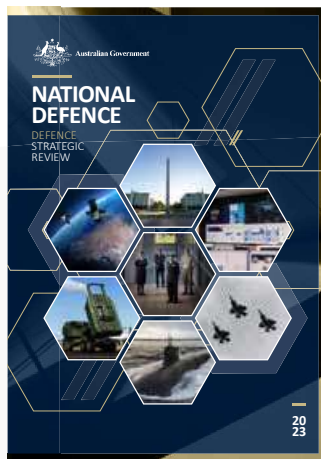


Strategic alignment with relevant policies and plans

The Report aligns with the following Australian Government and NT Government strategies and initiatives.



Maritime Industry 2024 Workforce Plan



2023 Defence Strategic Review



2024 Defence Industry Development Strategy



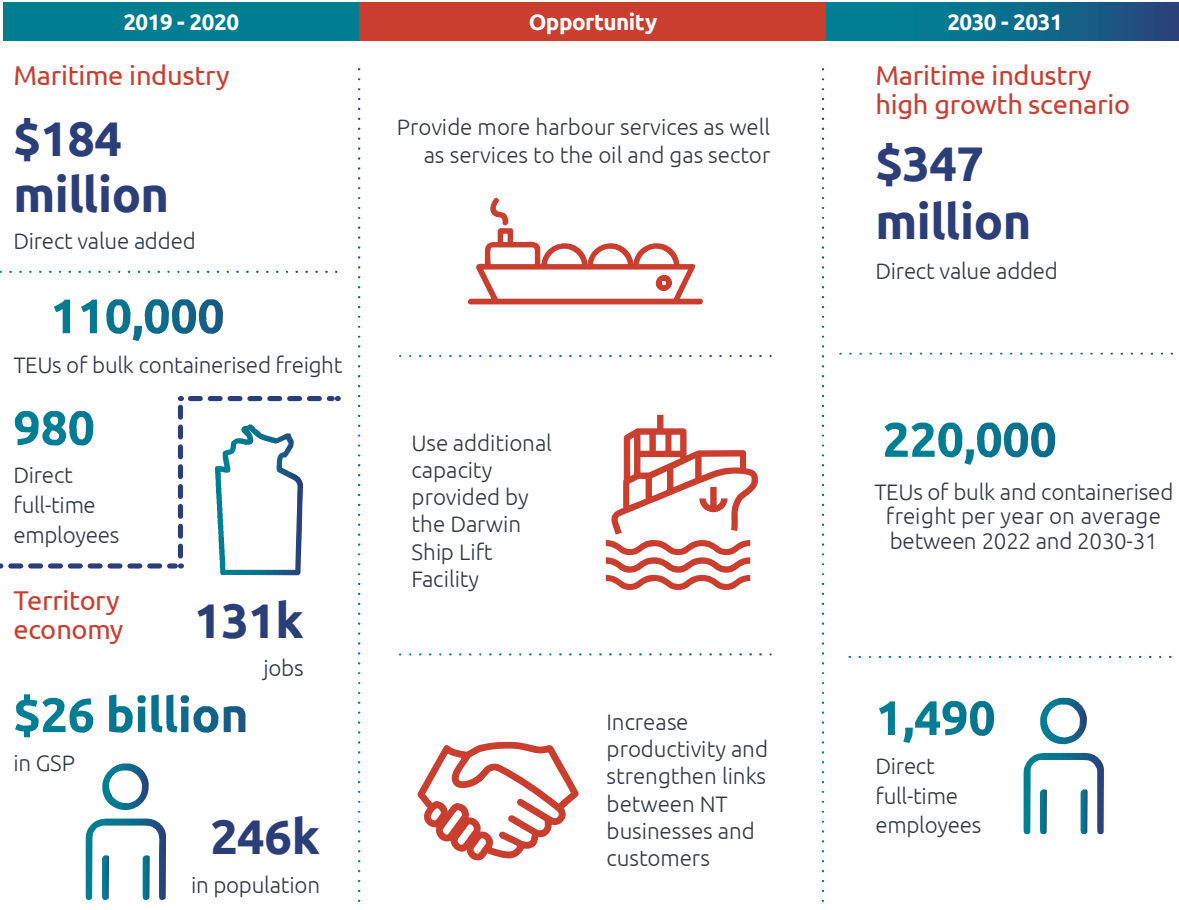
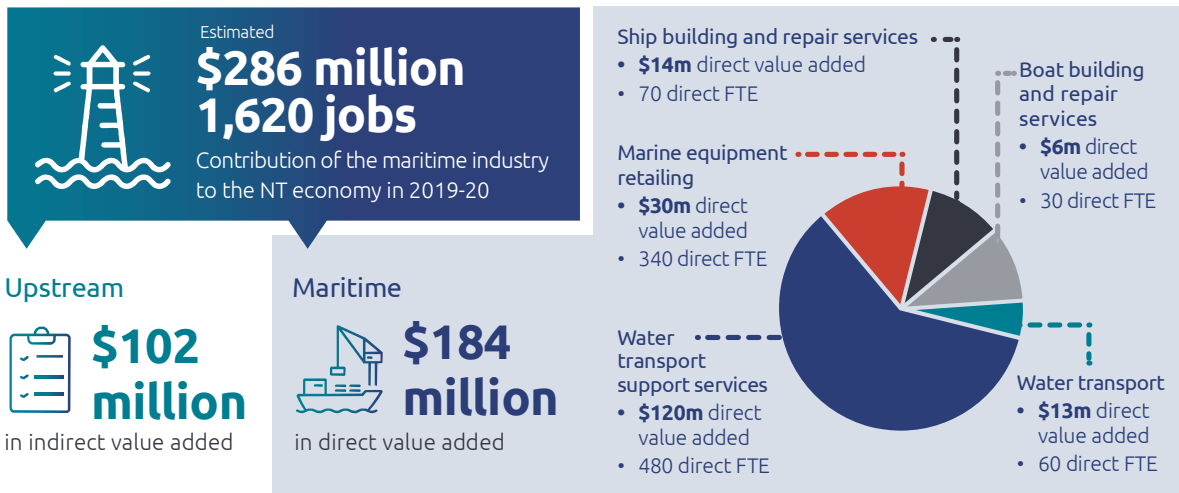
2024 Integrated Investment Program



2024 National Defence Strategy

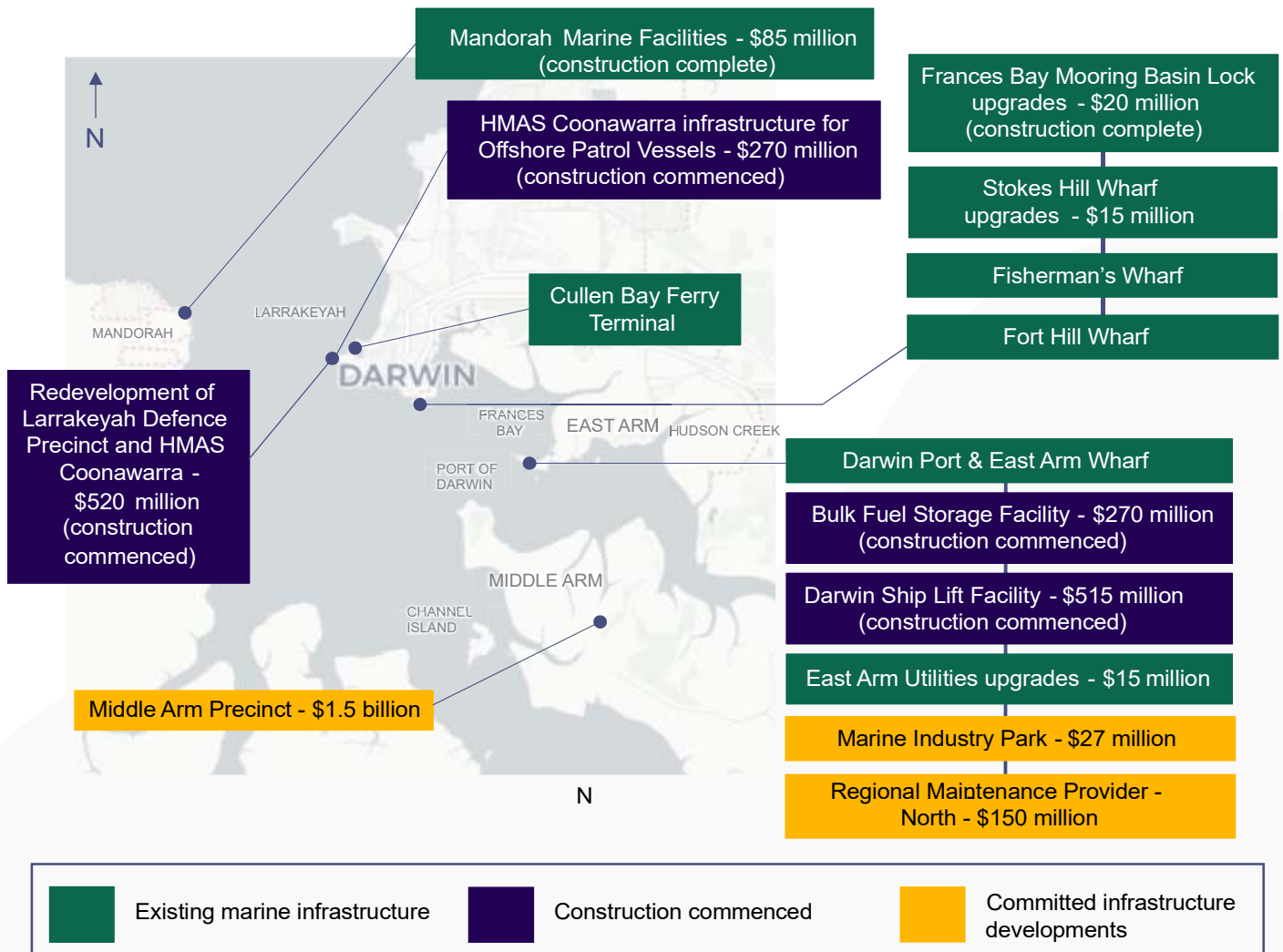
Industry snapshot

As the capital city of the NT and its maritime hub, Darwin's appeal lies in a combination of factors, including a vibrant local economy and diverse opportunities. As a key facilitator of trade, growth in the NT maritime industry largely depends on growth in the industries it services, such as Defence, agribusiness, minerals, and oil and gas. This is demonstrated by the composition of export products from the Port of Darwin, which includes dry bulk materials like manganese, and livestock. However, this dependence imposes a significant constraint on the growth potential of the industry, where limited capacity to generate local demand for its services exists.



Current state of planned and proposed infrastructure

The maritime industry in the NT encompasses a diverse range of sectors crucial for the region's economy and broader transportation networks. The current state of the industry can be characterised by the committed and proposed projects and investments in the region. The future of the industry largely depends on these projects being funded and delivered to unlock capability and capacity uplifts.



Stakeholder engagement

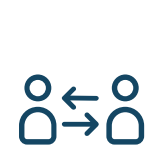
Consultation with maritime industry stakeholders was crucial to informing the Report. The project team undertook targeted engagement with industry and relevant government agencies to gain a deeper understanding of the challenges the industry was facing and what could be done to address these issues.

Number of stakeholders engaged



20 stakeholders

Consultations completed through:



One to one engagement



NT Government Workshop



Multiple stakeholder sessions



Types of organisations engaged include:

- Maritime industry bodies
- Port and harbour organisations
- Vessel repair, maintenance and sustainment providers
- Towage service providers
- Commercial industry service providers (e.g., freight and cargo services)
- Commercial companies that are users of marine services (e.g., oil and gas, commodities, tourism)
- NT Government
- Other service providers (e.g., safety training, equipment supply).





Capturing the industry's voice

"Because of the lack of training facilities in the NT, we're having to send a number of people to other states each year for basic training, which costs a significant amount of money and time per person."

"As a business owner in the NT, I'm really feeling the impact of workforce shortages. Competing with other industries and regions makes it tough to attract and retain workers here."

"The NT has significant competitive advantages over the east coast for superyachts. With some small investments in key enabling infrastructure, the NT could fully realise its potential and attract high-value maintenance and provisioning for the superyacht sector, which is currently hindered by the lack of cost-effective infrastructure and accessibility."

"We're facing real difficulties in attracting and retaining skilled professionals in the NT, even with the incentives and higher pay we're offering."

"We're experiencing a shortage of Australian seafarers nationally, with more jobs available than there are qualified employees. For us, this issue is only expected to grow with the increasing demand from heightened offshore activities."

"Darwin is very important for maritime Defence and maintaining the Defence capability. We feel Darwin needs to rapidly and urgently develop its ship lift and shipyard capability to meet growing Defence requirements in the NT."



The findings of the stakeholder sessions, generally fell into the following identified categories:



Maritime education and training



Workforce attraction and retention



Maritime infrastructure

By engaging with various stakeholders, the sessions were able to gather diverse perspectives and insights. This collaborative approach ensured that the identified categories accurately reflect the current needs and challenges within the maritime sector.

Consultation findings: Maritime education and training

	FINDING	DESCRIPTION
1.	A large portion of training is undertaken interstate, especially for vessel operators, with potential for more local opportunities due to digitalisation, automation, environmental, social, and governance (ESG) reporting, and sustainability legislation/policy requirements.	Stakeholders highlighted significant issues with the current training setup, noting that a large portion of the workforce must travel interstate for specialised training, which is inefficient and costly for both employers and employees. This is particularly problematic for vessel operators, specifically for advanced seafaring and engineering certificates. Additionally, the increasing use of digitalisation and automation, along with changing ESG reporting and sustainability legislation/policy requirements in the industry underscores the urgent need for more local training opportunities to equip the workforce with the necessary specialised skills (e.g., meeting sustainability requirements for Defence, such as for weapons systems and navigation equipment).
2.	Challenges in finding skilled labour for growth and untapped potential for a marine facility to train entry-level skills.	There is a significant challenge in attracting and retaining skilled labour necessary for business growth. Most stakeholders are advocating for local facilities to train entry-level skills, which would help in building a local talent pool and reducing dependency on external recruitment.
3.	Limited local training opportunities necessitate interstate travel for specialised training.	Some stakeholders highlighted that there are inadequate local training facilities, forcing costly and time-consuming interstate travel for advanced certifications. Local maritime courses often face enrolment challenges, leading to delays or cancellations, undermining confidence in their reliability. This lack of dependable options hinders efficient workforce development and retention.
4.	Stakeholders were broadly supportive for the establishment of a centre of excellence for maritime training.	Stakeholders emphasised the need for a comprehensive training hub to tackle the ongoing challenges of workforce development and retention. They suggested that a centre of excellence should feature advanced facilities, including a marine facility for heavy mobile equipment training and state-of-the-art simulators for pilotage and driving training, with a view to create a robust pipeline of skilled maritime professionals for the NT. Some stakeholders were concerned with potential demand for the viability of a facility of this nature.
5.	A view that Darwin has the potential to become a local training hub that draws national and international customers.	Stakeholders noted significant challenges in Darwin's training infrastructure, emphasising the lack of facilities to position it as a competitive hub. Despite its strategic location near Asia, the absence of developed programs and facilities limits its potential to attract national and international customers.

Consultation findings: Workforce attraction and retention

	FINDING	DESCRIPTION
6.	Stakeholders have a detailed and deep understanding of the workforce limitations in the NT.	Stakeholders highlighted significant issues with the current workforce capacity in Darwin, particularly the need for upskilling to manage larger vessels. They also pointed out the challenges in ensuring a good quality of life for workers and their families, which is essential for attracting and retaining talent. The heavy reliance on fly-in-fly-out (FIFO) models is seen as unsustainable, emphasising the need for more permanent solutions to create a stable and skilled workforce.
7.	Stakeholders highlighted that without subsidised training, local labour retention is at risk which may lead to workforce attrition.	Stakeholders expressed significant concerns about retaining local labour in the maritime industry. They highlighted that without incentives like subsidised training, the industry struggles to maintain a skilled workforce. This lack of support increases the likelihood of workers leaving the industry, exacerbating existing labour shortages and impacting overall performance. While this may not specifically lead to workforce attrition, it does create challenges in establishing effective training pathways for locals to enter the workforce as well.
8.	Operation Thrive, a veteran attraction retention program, offers an enormous opportunity to harness skills in defence that could go outside of defence and support the maritime industry.	This initiative ensures veterans are well-prepared for their new careers, which can lead to higher job satisfaction and longer tenure in the maritime industry. The Operation Thrive program is seen as a significant opportunity to leverage defence skills for the maritime industry.
9.	Some stakeholders experience approximately 30 per cent of the workforce turning over every 2-3 years.	Stakeholders highlighted high turnover rate, with about 30 per cent of the workforce cycling every 2-3 years in some instances. They stressed the importance of planning for this turnover by providing training and career progression opportunities to attract and retain skilled workers. By building this assumption into their future plans and the training required for these new workers, stakeholders can maintain the ability to continue to deliver services.

Consultation findings: Maritime infrastructure

	FINDING	DESCRIPTION
10.	Darwin has a strategic location advantage from multiple stakeholders' perspectives.	Darwin's strategic location is attractive for high-value markets like superyachts. Australia has the potential to offer a better option over Asian markets due to higher confidence in services and outcomes.
11.	Stakeholders highlighted that strategic infrastructure placement may enhance training pathways, facilitate in-house training and boost efficiency and worker retention.	Stakeholders highlighted the need for better placement of maritime infrastructure and formalised training pathways to address inefficiencies and improve worker retention. They pointed to successful models like the Australian Maritime College (AMC) and Fremantle ship lift project as examples of how strategic planning can enhance industry growth and sustainability.
12.	View that some pockets of infrastructure need to be rapidly and urgently developed, particularly in the ship lift and shipyard capability, and have an ability to cater to international maritime standards.	Stakeholders highlighted significant gaps in current maritime infrastructure, particularly in Darwin. Noting that the Marine Industry Park (MIP) and ship lift projects are now under construction, stakeholders pointed out that the existing ship lift and shipyard facilities are inadequate to meet both local and international demands. Stakeholders also voiced concerns about long-term planning in various pockets of infrastructure, such as Frances Bay Marina. This shortfall is causing delays and inefficiencies in maritime operations, impacting the region's ability to compete on a global scale. Additionally, there was stakeholder sentiment towards the need to improve infrastructure to support the workforce and ensure compliance with growing international maritime standards (including Defence requirements).
13.	A view that the industry has stalled, without improved access to some areas of existing infrastructure.	Stakeholders emphasised that the growth of some industries is hindered by inadequate infrastructure or limited access to existing facilities. Some stakeholders raised concerns about constraints relating to marine oil and gas infrastructure, particularly limited access to docking and maintenance facilities for oil and gas vessels. Improving infrastructure is seen as essential to support industry expansion and meet future demands.
14.	A view that the industry's demand profile will grow, requiring infrastructure and space planned with a 25-50 year outlook.	There is a general view from stakeholders regarding the critical need for long-term infrastructure planning to accommodate future industry demand. They stressed the importance of having sufficient infrastructure and space to support growth, with a strategic planning horizon of 25-50 years to ensure sustainable development and readiness for increased industry activities.
15.	Views that some tugboat infrastructure is inadequate, and an increase in demand for tugboat services would require additional tugboat pens.	Stakeholders highlighted that an increase in vessel traffic derived from major projects and increased operations would materially impact tugboat proponents' current ability to meet demand for tugboats, as well as the requirement for more tugboat pens to support this increased vessel activity.
16.	There are likely to be opportunities associated with the energy transition over the coming decade.	Some stakeholders recognised the potential opportunities that the transition to net zero would create from both an infrastructure and workforce development perspective.
17	Regional communities depend upon unreliable maritime infrastructure for day-to-day and critical supplies.	Regional communities are heavily reliant on maritime infrastructure for delivery of food, medical and other supplies, particularly during the wet season when roads are cut for many months at a time. Issues related to the current quality, accessibility and future of this infrastructure need to be considered and addressed.

NT maritime business capability

The maritime industry in the NT has sufficient coverage of capability, but lacks capacity

The Industry Capability Network (ICN) provided a comprehensive analysis of business capability to support the maritime sector in the NT. The maritime industry is pivotal to the region's economic development, facilitating trade, transportation, Defence sustainment, infrastructure and resource extraction activities. The Regional Maintenance Provider (RMP) 5-year contract was awarded to Norsta in December 2023. Norsta will operate the RMC-N and manage the demand from Defence for vessel maintenance and repair services, enhancing the region's capacity to support maritime operations. Additionally, the Darwin Ship Lift Facility aims to further strengthen infrastructure and support services for the maritime sector, ensuring efficient vessel maintenance and logistical support as the region grows.

The ICN has broadly investigated businesses capable of performing the required packages of work across the maritime sustainment supply chain. The findings demonstrate the wide-ranging potential within the NT's current and developing supply chain, showcasing established maritime or marine specialists and emerging enterprises with proven capability to support and capitalise on opportunities for the long-term growth of a successful maritime sector.

Capability and Capacity Overview

The classification of capabilities is based on the number of businesses, the nature of the work, and the demand intensity. In determining whether a category is classified as 'Limited Capability,' 'Medium Capability,' or 'Strong Capability,' consideration is given to the level of specialisation required, the balance between service-

based and supply-based work, and the scalability of local industry to meet current and future demands.

In total, 368 unique businesses were identified as capable against the high-level requirements of one or more of the identified 108 packages of work. Refer to graph on the following page. The listed capabilities were identified following analysis of the Northern Territory maritime industry and its requirements. Each package of work represents an essential capability for different aspects of key Territory projects such as RMC-N, Darwin Ship Lift, commercial vessel repairs and maintenance and infrastructure building and upgrades.

The findings concluded the following capability and capacity banding across 13 statements of work, which form the grouping structure for the subsequent 108 packages of work:

- **Strong Capability and Capacity:** Electrical and Communications, Fabrication, and Mechanical. These categories were found to have evidence of strong capability and capacity matches amongst the local industry.
- **Medium Capability:** Suppliers and Wholesalers, Utilities, Heating, Ventilation, and Air Conditioning (HVAC), Other, Marine Operation Support, Corrosion Control and Navigation. These categories were found to have evidence of moderate capability and capacity matches and present an opportunity for further capacity development to meet increasing demands.
- **Limited Capability:** Survey, Plumbing and Water, and Marine Construction. These categories were found



to have only mild capability and capacity, which is potentially sufficient for the current work demand in the NT. However, these areas present a higher degree of capacity concern and potential need for development to handle future demands effectively.

Industry Demand and Supply Gaps

ICN's industry capability mapping analysis found there were no significant capability gaps. The region's current high capability and baseline can be attributed to a long-standing and diverse range of vessels operating, such as Defence patrol boats, tugboats, livestock export vessels, platform supply vessels, large commercial fishing and pearling boats and various pieces of marine infrastructure.

ICN engagement undertaken for the defence patrol boat maintenance showed that historically, local businesses have managed the demand, handling approximately 50 short maintenance periods annually. Across nearly all elements of the maintenance program, local subcontractors were used, with minimal reliance on specialised interstate contractors. However, when considering the maritime industry as a whole, there is concern about the current supply chain's ability to scale its capacity in line with the expected growth across Defence, commercial sectors, and infrastructure needs. A common theme raised by industry stakeholders is the shortage of staff, spanning from highly skilled professionals to support roles. Addressing this workforce challenge for future demand is crucial for leveraging existing capabilities and capitalising on local, domestic, and international opportunities.

Geographic Distribution

The geographic distribution of businesses supporting the maritime sector in the Northern Territory reveals a significant concentration in specific areas.

- **Regional Distribution:** Approximately 90 per cent of maritime-related companies are situated within the Darwin, Palmerston, and Litchfield local government areas (LGAs). The remaining 10 per cent are distributed across other regions, including East Arnhem, Top End, and Big Rivers.
- **Capability and Capacity Disparities:** There is a marked disparity in the capability and capacity of businesses among these regions. The Darwin, Palmerston, and Litchfield LGAs hold a monopoly on maritime industry activities due to their established infrastructure and business presence. However, East Arnhem and regional areas in the Top End LGA, including the Tiwi Islands, lack the capability, capacity, and infrastructure to support industry growth and demand.

Overall, the ICN's analysis confirms that the NT maritime industry currently has sufficient capability coverage, with at least two businesses capable of covering each package but could lack in capacity and depth in some areas as industry demand grows. Industry feedback strongly supported these findings, with stakeholders reiterating that workforce capacity is the primary challenge and inhibitor to growth for businesses in the NT.

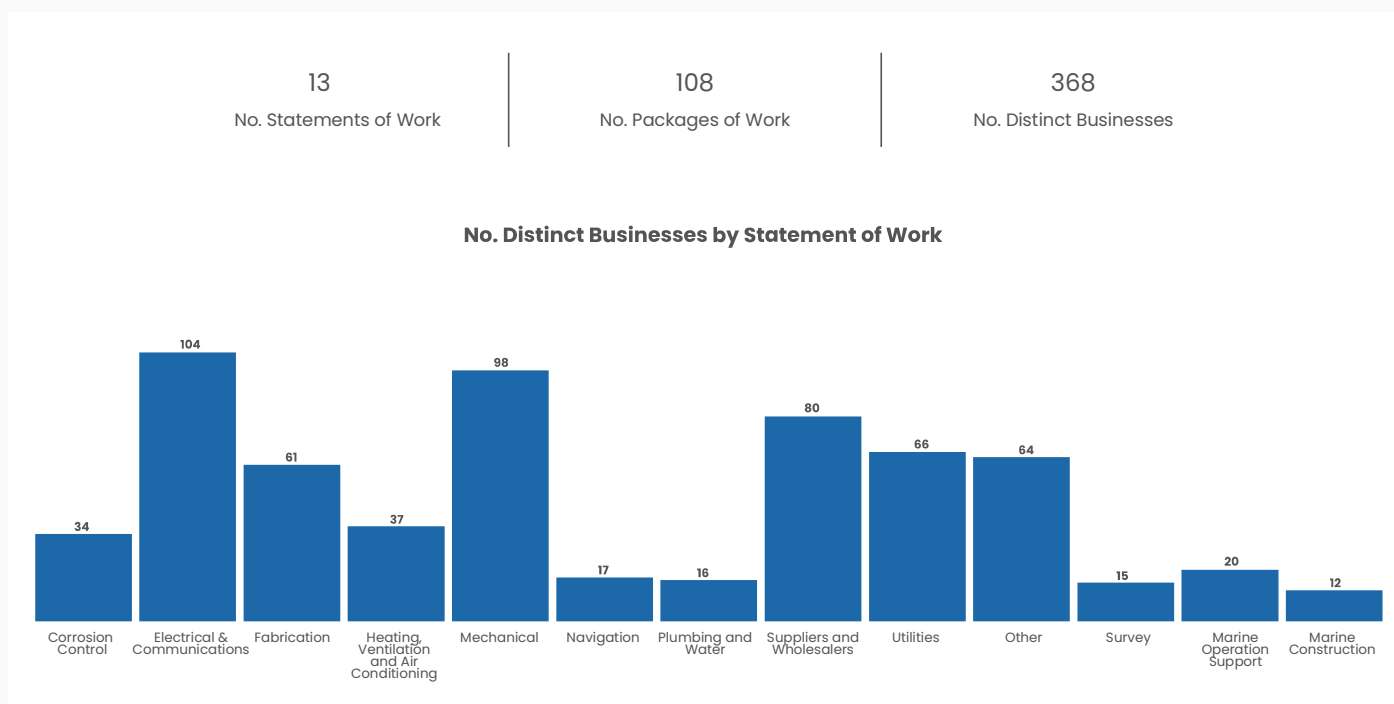


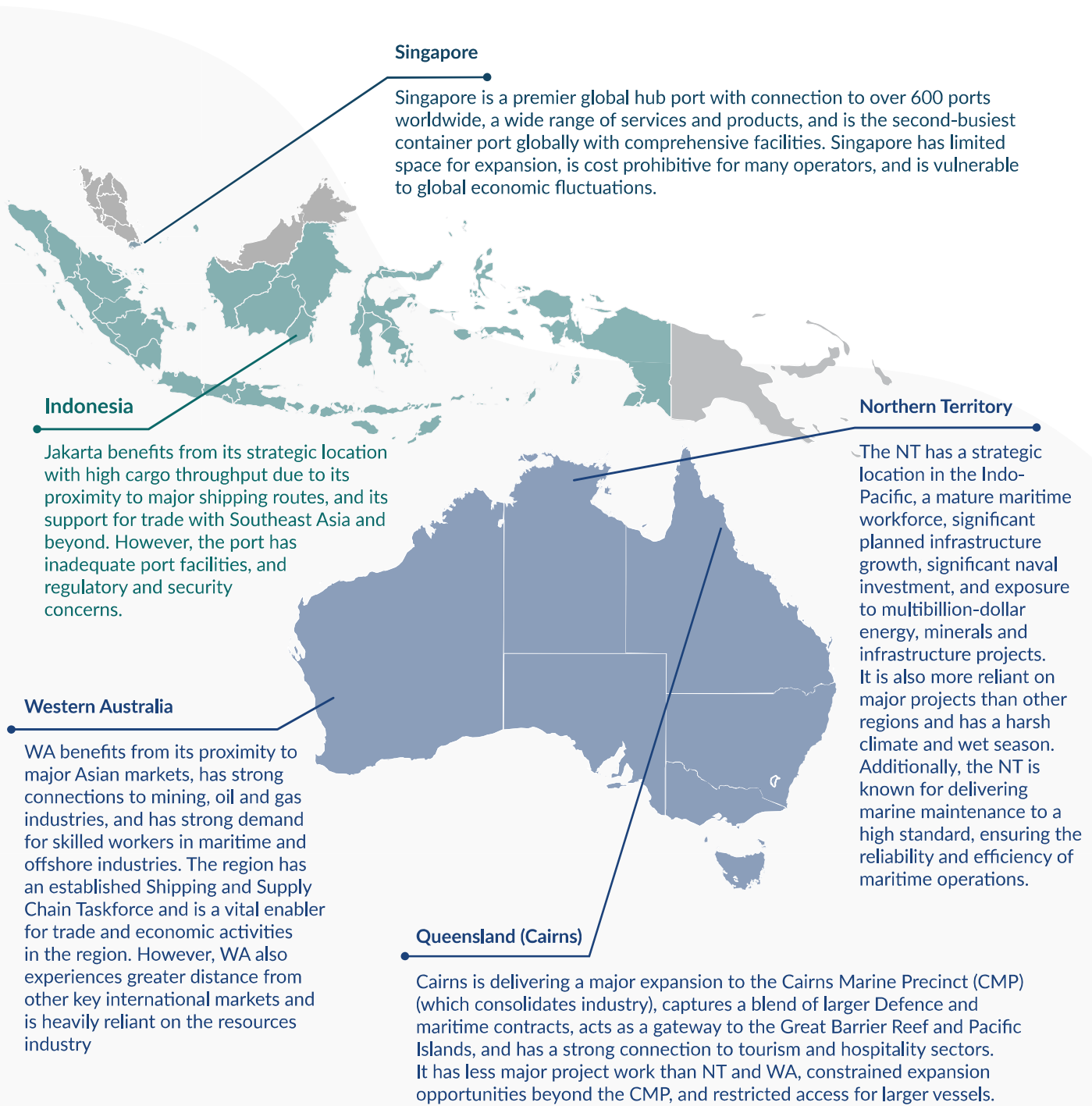
Figure 2. Industry Capability Mapping and Gap Analysis: Maritime Service and Supply

Comparative analysis

Northern Australia is competitive when compared to Indonesia and Singapore, due to its capability, quality, value for money, and political and regulatory stability

The maritime industry in the NT showcases strong business capability, positioning Darwin as a hub for maritime service and supply. Potential growth within the industry is driven by a necessity to support various operations, including those of the ADF, oil and gas operations, commercial activities, tourism and general marine operations.

The NT's competitive position is underscored by its unique geographic advantages. Darwin Harbour, with its deep-water port and close proximity to Darwin International Airport and the Adelaide to Darwin Rail Line, serves as a crucial connection point. Its location makes it the Australian capital closest to Asian markets. Asian markets account for 65 per cent of Australia's trade, positioning the NT as a strategic location for marine repair and maintenance.





Key themes influencing the industry

The Report identified several key overarching themes that influence the industry in the NT, both historically and currently. These themes have been used to guide our analysis throughout the development of the report.

Key theme #1 – Defence expansion across northern Australia

Increased Defence activity across northern Australia, particularly in Darwin is a key theme driving the maritime industry in the NT. The strategic importance of Defence expansion across Australia's northern approaches is critical to the security of the nation.

The *2024 National Defence Strategy (NDS)* and the *2024 Integrated Investment Program (IIP)* together provide a blueprint to deliver an ambitious transformation of the Australian Defence Force (ADF) to ensure it is positioned to safeguard Australia's security and contribute to regional peace and prosperity for decades to come. Relevant to the transformation, the plans include upgrades to HMAS Coonawarra and the establishment of the Regional Maintenance Centre – North (RMC-N). The RMC-N forms part of a larger Defence support and sustainment program that is being established across Australia. The establishment of the RMC-N is a significant move towards “strengthening the north”, ensuring that complex naval capability is available when and where required.

The increased Defence activity, driven by the Royal Australian Navy's future fleet and the Australian Army's light-littoral combat fleet, will necessitate infrastructure and maritime services to operate out of the NT. The Darwin Ship Lift Facility and MIP will be crucial for accommodating these vessels and the industry to support it. Future activity will place a demand for maritime services to be ready and available, further underscoring the need for sufficient infrastructure and workforce capacity to support the impact increased Defence activity will have on maritime services in the region.

Key theme #2 – Attraction and retention of maritime industry personnel in the Northern Territory

There are challenges associated with the natural characteristics and location of the NT that are rooted in various aspects of life and work. Issues related to staffing, employee retention, and attracting younger generations to the maritime industry in the NT are significant challenges largely influenced by the characteristics of the region. Broader climate and amenity features of the NT have a significant influence on the maritime industry, with the hot and humid wet season, the distance from other major cities and housing challenges making it harder to attract and retain skilled workforce.

Overcoming and addressing these challenges to attract and retain skilled workforce emerges as a key theme in the narrative of the NT maritime industry and is a driving force in the inability to meet potential maritime industry demand.

Key theme #3 – Potential impact of major projects as industry growth drivers

Major projects in the NT, such as the Middle Arm Precinct, the MIP, and the Darwin Ship Lift Facility, will support a significant portion of demand for maritime services, raising the baseline capability and capacity and contributing to the broader activity of the industry. However, some major projects, such as the Barossa Gas Project, may increase growth fluctuations and industry variability, which leads to difficulty retaining workforce capability. This reflects the boom and bust nature that has impacted many industries and the economy in the NT. These projects often offer higher financial incentives for staff than the non-project related work, which encourages short-term stays in the NT until the project is complete. They also impact regional maritime infrastructure, which are crucial for communities across the Territory that rely upon these ports and barge landings for delivery of food, medical and other supplies, particularly during the wet season when roads are cut off for many months at a time.

Over the coming years, fostering sustainable growth in the maritime industry will be crucial. A sustainable approach is key to effectively managing the potential impacts to the capability and capacity of the maritime industry that may be experienced through major projects. There is an anticipation of significant increases in operation and demand tied to these major projects, which underscores the importance of aligning workforce capability and capacity development and infrastructure investments with future industry growth trajectories.

Key challenges

The NT maritime industry is facing challenges in education and training, attraction and retention, and pockets of maritime infrastructure



Maritime
education and
training

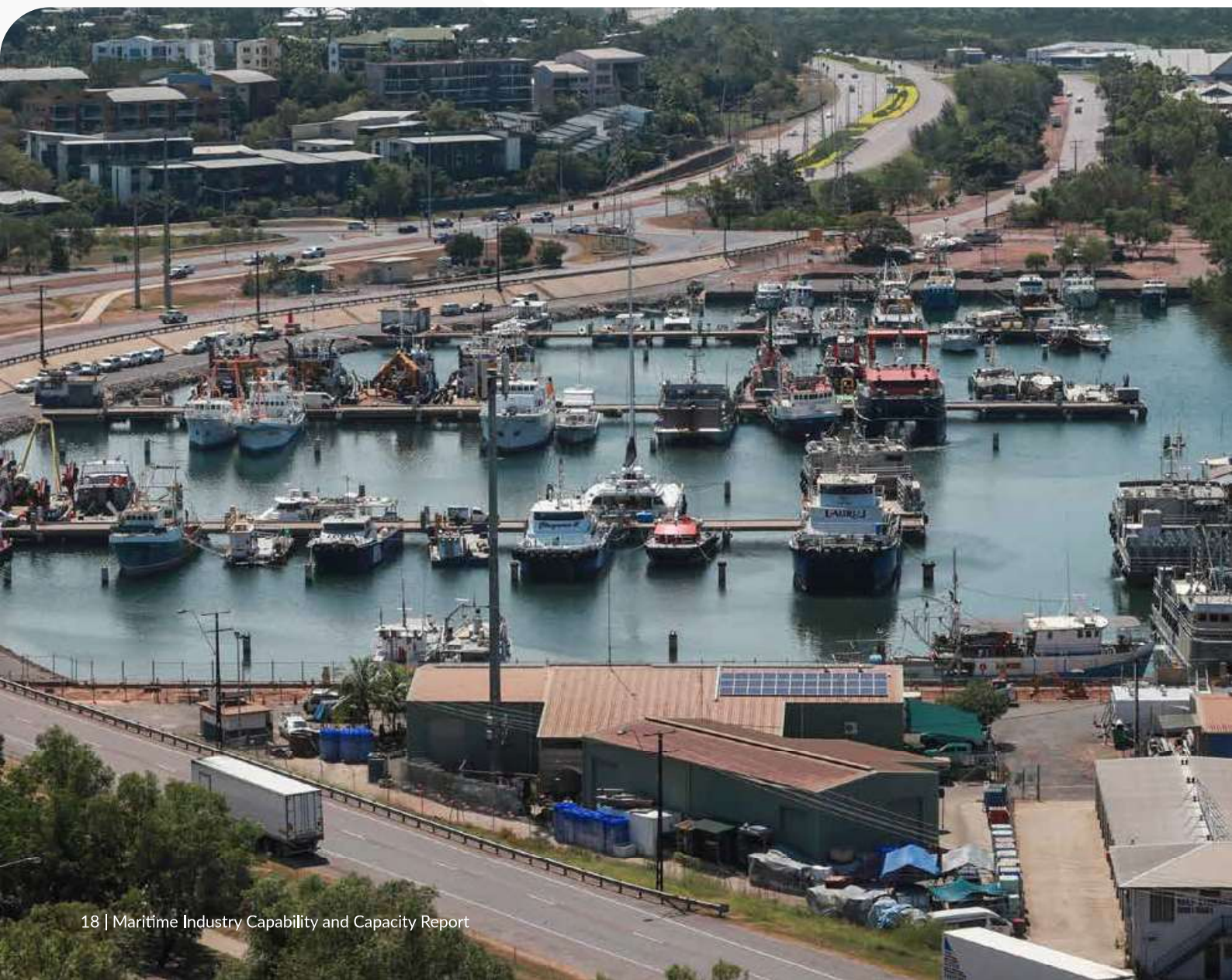


Workforce
attraction and
retention



Maritime
infrastructure

As part of the development of the Report, stakeholders' views on the capability and capacity of the maritime industry in the NT were obtained. The process provided critical insights into the industry's key challenges and gaps. Stakeholder sentiment towards these challenges highlighted three main areas, which guided the development of the initiatives that underpin this Report:



Maritime education and training

Challenges

Limited access to specialised maritime education and training programs within the NT poses a significant challenge. This challenge is due to several factors:

- **Training scheduling** – Key maritime training programs are not offered locally on a reliable schedule, leading to low enrolment rates in available courses, contributing to perceived low demand for training
- **Training availability** – Some essential courses are completely unavailable in the NT, forcing the workforce to seek training interstate
- **Quality concerns** – Concerns regarding the quality of existing local training programs, and ability to meet changing industry standards

These challenges result in:

- A shortage of qualified personnel to meet the demands of the maritime industry
- Reliance on external talent
- Increasing recruitment costs
- A net loss to maritime workforce as skilled individuals seek opportunities elsewhere.

Stakeholder consultation indicated that most proponents send their personnel to Cairns, Perth, Melbourne and Tasmania to undertake training courses and certifications.

Gaps

- **A lack of skilled grey collar workers (e.g., marine electricians)** – There is a need for, and lack of, grey collar workers to upskill industry entrants (particularly for marine electricians) amongst small to medium sized businesses within the industry.
- **Limited supply and offering of upskilling and training needs in the NT** - Interstate travel is required to obtain advanced training and upskilling opportunities due to limited NT offering beyond basic qualifications, further constraining skill development and opportunities locally.
- **Gaps in the education pathways** - The current approach towards advanced trade skilling in the NT does not efficiently enable the implementation of novel technologies, support flexible learning approaches and is currently lagging in terms of meeting the evolving training needs of the industry.
- **A lack of sufficient funding** – While there are mechanisms for supporting organisations in undertaking training and upskilling personnel, this is uncompetitive with other regions of Australia, particularly for more advanced training, where other states significantly subsidise maritime training held locally and interstate. This results in significant costs being incurred by the businesses.



Workforce attraction and retention

Challenges

Employee attraction and retention challenges are underscored by several key factors:

- **Climate and location - Attraction and retention** issues are one of the most significant hurdles that are exacerbated by the working conditions of the industry (inside engine hulls and outdoors).
- **Workforce challenges** - The region also faces workforce shortages due to an aging workforce, limited interest from younger generations, and competition from other industries including mining, and oil and gas.
- **Lack of skilled workers** - Efforts to recruit and train local talent are hindered by the scarcity of skilled workers and the tendency for employees to leave for opportunities interstate. Challenges persist in finding qualified local candidates, highlighting the need for government support to enhance workforce growth and training opportunities.

Gaps

- **Lack of knowledge/promotion of career development opportunities** - There is a notable lack of local qualifications and/or inconsistent training program availability for specialised roles such as marine engineering.
- **Perceived lack of excitement of the maritime industry** - Discussions highlighted challenges in attracting younger generations to the industry, attributed in part to the perception of maritime-related activities.
- **Local talent development** - There is a current reliance on FIFO work models to meet demand for major projects, which highlights the pressing need for strategic investment in local talent development.



Maritime infrastructure

Challenges

Overall, the industry in the NT has significant planned and funded infrastructure developments that will help elevate the capability of the industry over the next 10 years. However, several isolated but important issues are compromising growth:

- **Superyacht infrastructure** – Insufficient infrastructure is restricting existing demand and growth in high-value visits and maintenance activities due to an inability to safely dock and access the vessels. Despite this, Darwin has a significant competitive advantage and could be a preferred location for maintenance and provisioning.
- **Regional infrastructure** – In the regions of the NT, the combination of insufficient, privately held, and aging infrastructure creates barriers to entry and creates risks to supporting the regional populations.
- **Wharf space during busy periods** – Insufficient wharf space during major project delivery periods, particularly for tugboats, is restricting activity in key sectors in the region.

Gaps

- **New Superyacht infrastructure, including floating wharves** – Floating wharves will enable an immediate increase in high-value superyacht visits for maintenance and provisioning.
- **Common user regional infrastructure** – Suitable regional infrastructure could unlock increased competition, activity and security for regional populations and businesses.
- **Accessibility and wharf space concerns** – Insufficient wharf space and pens during major project delivery periods impedes vessel operations and poses challenges for workforce accessibility and productivity, and the ability to meet spikes in demand.
- **Support for oil and gas industry growth** - There is a potential need for additional oil and gas infrastructure / service and supply capability to accommodate future growth of this industry.



Maritime projects to boost industry demand

Based on the analysis and engagement undertaken, there is an envisioned upward trajectory for the maritime industry within the NT, highlighting future demand, infrastructure requirements, and requisite capabilities and skills essential to realising the future vision.

Future uses and maritime industry demand

Looking forward, the future state of the maritime industry in the NT is closely linked to the broader themes in Australia's maritime sector. Maritime projects and associated industry projects with committed funding and potential uncommitted projects will play a fundamental role in shaping the future state of the industry. In recognition of the crucial role the maritime industry plays in the NT economy, the NT Government and its partners are investing over \$3 billion in the sector over the next four years in Darwin and across the NT.

Impact categories are defined as follows:

MAJOR

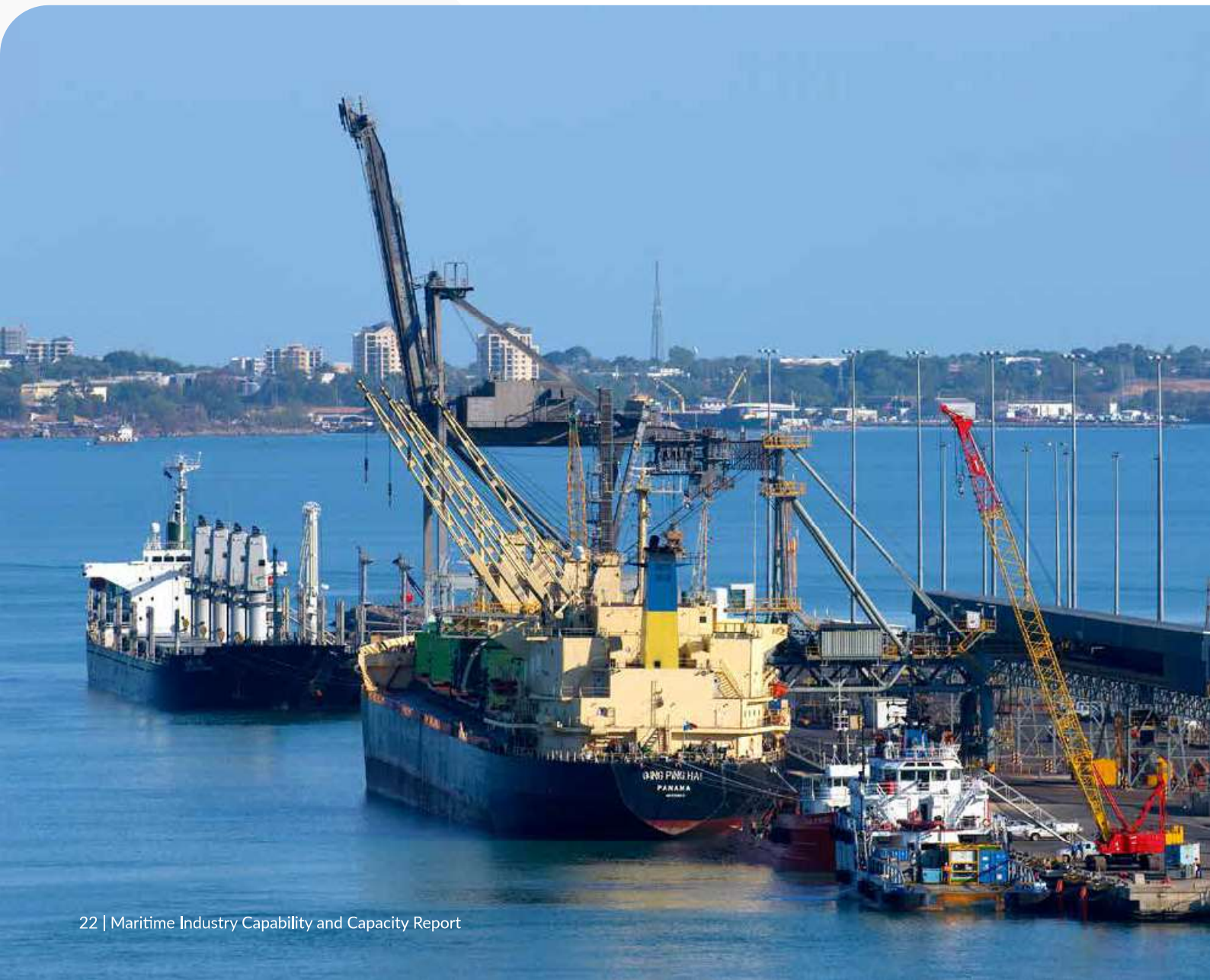
Significantly boosts industry demand, driving economic growth and operational expansion.

MATERIAL

Enhances operational capabilities, supporting more rapid industry growth and development.

MINOR

Provides slight operational improvements, with minimal effect on overall industry demand or capacity.



Project and commitment status

PROJECT	STATUS	IMPACT OF THE PROJECT	IMPACT
Darwin Ship Lift Facility – The ship lift will enable lifting vessels up to 5,500 tonnes.	Committed	<ul style="list-style-type: none"> Increased lift capability and capacity in northern Australia Industry believes the ship lift is most likely to cause an increase in Defence, energy-related and other commercial vessels seeking maintenance and repair services. 	MAJOR
RMC-N - The RMC-N will offer maintenance and operational support to naval capabilities in northern Australia.	Committed	<ul style="list-style-type: none"> Enhancement in capability offering in the NT through increased maintenance and operational support Increase in naval and supporting vessel visits through the adjacent ship lift. 	MATERIAL
MIP Stage 1 - The MIP is strategically located on premium waterfront land at East Arm and aims to become the premium vessel servicing point between Cairns and Perth.	Committed	<ul style="list-style-type: none"> Consolidation of maritime related services and increased supply of maintenance, repair and operations (MRO) capacity The initial barge ramp will offer logistic support for commercial use and enhance vessel accessibility to support services. 	MATERIAL
Frances Bay Mooring Basin - NT Government delivered significant upgrades of the Frances Bay Mooring Basin lock.	Construction complete	<ul style="list-style-type: none"> New lock doors, modernised mechanical and electrical systems and increased protection to provide longer-term sustainability, efficiency and safety. 	MINOR
HMAS Coonawarra - As part of the Larrakeyah Defence Precinct redevelopment, upgrades to support naval operations in the north are being delivered.	Committed, construction underway	<ul style="list-style-type: none"> Increased capability through the construction of a new 250m long wharf, a 3,000 m² hardstand with associated buildings and a new ready-use fuel facility Increased naval activities, vessel visits and capacity to accommodate more vessels. 	MATERIAL
Mandorah Marine Facilities - Improvement of public transport services and enhanced accessibility, safety and operational efficiency through new and enhanced infrastructure.	Construction complete	<ul style="list-style-type: none"> Increased demand as a result of increased frequency, accessibility and capacity of ferry services Employment opportunities and capability boost through ferry berthing facilities. 	MINOR
MIP future stages – Future stages are yet to be defined, but likely include additional land capacity and marina.	Uncommitted, concept future stages	<ul style="list-style-type: none"> Enhance the MRO offering of the region Increase opportunities for marine service training facilities Ability to cater to all types of vessels, increasing vessels visits Increase connections to road, rail, and sea transport and other supporting infrastructure. 	MATERIAL
Middle Arm Precinct – Establishment of a range of heavy industry importers and exporters.	Part committed	<ul style="list-style-type: none"> Aim to maximise shared infrastructure, including marine facilities to enhance capability and capacity offering A significant increase in maritime traffic as the precinct develops and attracts more industries Vessels may include liquefied natural gas (LNG) carriers, hydrogen carriers and other commercial vessels. 	MAJOR

