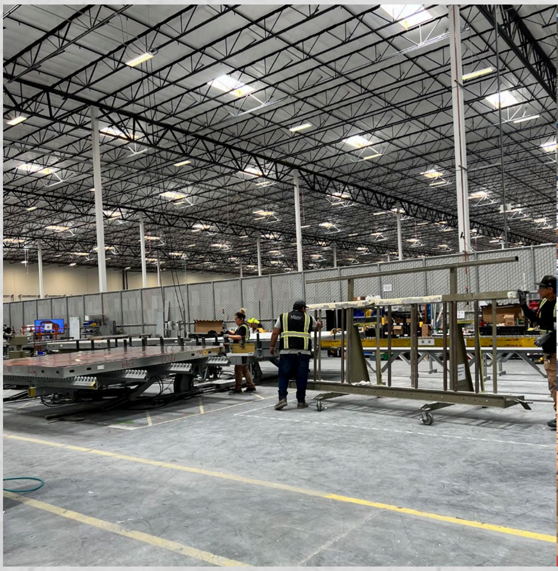
building 4.0 crc

PROJECT #102: SKILLS AND TRAINING IMPLICATIONS OF MODERN METHODS OF CONSTRUCTION: ACROSS DESIGN, MANUFACTURE AND ASSEMBLY

FINAL REPORT



MONASH University

BuildSkills Australia

Manufacturing Industry Skills Alliance

Skills Insight

Australian Government
Department of Industry, Science and Resources

Cooperative Research Centres Program

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#102: Skills and Training Implications of Modern Methods of Construction: Across Design, Manufacture, and Assembly

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Author/s of this report:	Laura Gutierrez-Bucheli, Duncan Maxwell, Sahar Soltani, Isabel Solin
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Project team members:	Laura Gutierrez-Bucheli, Duncan Maxwell, Sahar Soltani, Gillian Kidman, Jean-Paul Rollo, Rachel Couper, Lisa Giusti Gestri, Isabel Solin
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Disclaimer

ABBREVIATIONS

ASQA—Australian Skills Quality Authority

BIM—Building Information Modelling

CITB—Construction Industry Training Board

DfMA—Design for Manufacturing and Assembly

HE—Higher Education

MEP—Mechanical, Electrical, and Plumbing engineering

MMC — Modern Methods of Construction

PVC—Prefabricated Volumetric Construction

QA—Quality Assurance

TEQSA—Tertiary Education Quality and Standards Agency

VET—Vocational Education and Training

EXECUTIVE SUMMARY

Australia's built environment sector faces converging pressures that traditional construction methods have proven structurally unable to resolve: a housing supply crisis driven by decades of constrained delivery, chronic productivity decline, acute labour shortages, and surging sustainability requirements. Modern Methods of Construction (MMC), which leverage off-site manufacturing, platform-based production, and integrated digital workflows, offer a transformative response to each of these challenges. Yet despite growing policy momentum and industry interest, widespread MMC adoption in Australia remains constrained. This research, conducted by Monash University's Future Building Initiative through Building 4.0 CRC and in partnership with BuildSkills Australia, Manufacturing Industry Skills Alliance, and Skills Insight, investigated the workforce implications and skill needs essential for MMC adoption across the Australian built environment value chain and developed evidence-based recommendations to guide workforce development, training provision, and education reform.

Conducted across three stages, the research combined international benchmarking of MMC workforce development approaches across mature markets, a national industry investigation through survey, consultation, and observations, and an assessment of the readiness of Australia's VET and higher education systems to meet MMC workforce demands.

The findings reveal that the principal constraint on MMC adoption in Australia is a workforce development system that was not designed for MMC. This constraint is not confined to a single occupational group or phase of delivery. It affects architects, engineers, manufacturers, tradespeople, builders, and certifiers alike, and it is embedded in the qualification frameworks, curriculum structures, and pathway arrangements that govern how built environment workers are trained and credentialled. Four interconnected findings explain why.

Australia's MMC sector is characterised by uneven capability distribution across the value chain, a workforce paradox in which labour shortages simultaneously motivate and prevent MMC adoption, and a persistent gap between recognised training needs and actual investment—with 70% of companies that do invest relying on in-house programs that are costly, non-transferable, and unsustainable at scale. MMC demands a different delivery and working logic from all workforce segments across design, manufacturing, and assembly, requiring not simply new skills but new mindsets, new coordination practices, and new occupational configurations. The Australian market's predominantly horizontal integration means that coordination defaults to manufacturers by default rather than design, revealing the absence of roles specifically configured to manage the design-to-manufacture and manufacture-to-installation interfaces. In response, this research proposes a networked system of boundary-spanning practitioners whose persona profiles are documented in Appendix III. MMC is generating new occupational types, including grey-collar hybrid roles, cross-disciplinary manufacturing specialists, and multi-skilled operatives, which do not require entirely new qualifications but targeted and modular access to cross-boundary knowledge that existing qualification pathways cannot currently provide. Neither VET nor higher education, nor the interface between them, is currently configured to produce these capabilities, with curriculum misalignment, structural pathway gaps, and insufficient system responsiveness identified as the three principal barriers.

These findings are situated within an active national policy reform discourse. The Qualification Reform Design Group's purpose-driven qualification model (2024), now formalised through the Training Package Organising Framework (Skills and Workforce Ministerial Council, 2025), Jobs and Skills Australia's tertiary harmonisation roadmap (Jobs and Skills Australia, 2025b) and National Skills Taxonomy (2025a), and BuildSkills Australia's VET Future Readiness Review (2025b) all point toward the directions this research's findings confirm are necessary. Purpose 2 and Purpose 3 qualifications under the Training Package Organising Framework represent the most promising existing policy mechanisms for addressing MMC's cross-sectoral and hybrid capability needs.

The recommendations are directed at four audiences. Government and policy bodies should embed this research's findings into the qualification reform work already underway, prioritise Recognition of Prior Learning pathways for workers transitioning from manufacturing into construction, and support the Future of Housing Construction Centre of Excellence as a national coordination mechanism for MMC training provision. Industry should adopt shared language and role definitions across the value chain, formalise cross-sectoral recruitment pathways from manufacturing, and invest in sustained co-design partnerships with education and training providers. Education and training providers should embed MMC-specific knowledge as a core curriculum requirement in both VET and higher education, develop articulated cross-sector pathways that enable targeted access to cross-boundary knowledge, and position micro-credentials as entry points into broader accredited pathways rather than standalone solutions. The research community should evaluate the effectiveness of emerging training initiatives, investigate the application of Purpose 2 and Purpose 3 qualifications to MMC cross-sectoral transitions, and address the twin transition between digital and sustainable construction as a boundary of this research's scope that warrants dedicated future investigation.

The recommendations are interdependent. Curriculum reform without pathway reform produces graduates with MMC knowledge but no formal recognition of it. Qualification reform without industry co-design produces credentials that do not reflect workplace realities. Effective implementation requires coordinated action across all four audiences, and the network of relationships between BuildSkills Australia, the Future of Housing Construction Centre of Excellence, Jobs and Skills Councils, and the industry partners engaged through this project provides the most immediate coordination mechanism available for that purpose.

1. PROJECT OVERVIEW

Australia's built environment industry faces converging environmental, social, and economic challenges that traditional construction methods have proven structurally unable to resolve. The built environment is responsible for 37% of global energy-related greenhouse gas emissions, while construction and demolition activities generate over 25% of global waste (European Commission, 2021). Australia's construction sector continues to rely on fragmented, site-based, and bespoke practices that generate significant material waste and limit the adoption of low-carbon technologies and processes (Muñoz et al., 2025). These practices compound the sector's environmental footprint at a time when the built environment is under mounting pressure to decarbonise rapidly, reduce embodied carbon in materials, and improve building energy performance across the full asset lifecycle.

Housing affordability represents perhaps the most acute social crisis facing the Australian built environment. Deteriorating price-to-income ratios—driven by rising construction costs, complex planning regulations, and chronically constrained supply—have placed quality housing beyond the reach of growing proportions of the population (OECD, 2021). The National Housing Accord commits to 1.2 million new dwellings by 2029, yet recent data shows dwelling commencements falling almost one-fifth short of the required quarterly rate of 60,000 units, with only 48,778 dwellings commenced in 2025. Meeting the Accord's targets is estimated to require approximately 117,000 workers beyond baseline supply (BuildSkills Australia, 2025a). However, the industry is concurrently struggling to attract and retain the workers it already needs, with a 2026 Housing Industry Association survey finding that two-thirds of builders struggle to recruit or retain skilled workers (Housing Industry Association (HIA), 2026). These workforce pressures signal an industry struggling to remain competitive in an increasingly demanding labour market.

That struggle for competitiveness is rooted in a deep and long-standing productivity crisis that has weakened the industry's capacity to deliver at the scale and pace Australia demands. Physical productivity, measured as dwellings completed per hour worked, has fallen by 53% since the early 1990s (Productivity Commission, 2025), while annual labour productivity growth has averaged just 1% over the past two decades, compared to 2.8% across the broader economy and 3.6% in manufacturing (Barbosa et al., 2017). Since 2014 alone, construction industry productivity has declined by 16.5% (ACA, 2020). These figures signal that the sector's housing supply constraints are structural rather than a product of insufficient workforce numbers. Expanding the workforce without reforming the practices and systems within which it operates will not close the housing shortage but deepen the productivity deficit that sustains it. Given that construction represents the fifth-largest sector in the Australian economy, contributing approximately 10% of GDP and supporting hundreds of thousands of jobs, the economic imperative to address this productivity deficit is urgent.

Modern Methods of Construction (MMC) offer a transformative response to each of these interconnected challenges. By shifting from bespoke, site-based practices toward platform-driven, process-oriented, and off-site production approaches, MMC optimises construction workflows while increasing predictability (Soltani et al., 2025). Environmentally, MMC's precision manufacturing in controlled factory settings directly reduces material waste, minimises rework, and enables the integration of low-carbon materials and processes (Muñoz et al., 2025). Socially, MMC's factory-based production model can accelerate the delivery of quality and affordable housing at scale while simultaneously diversifying the workforce and providing safer workplace conditions (López-Guerrero et al., 2022). Economically, MMC can reduce construction timelines and costs by up to 50% and 20% respectively (Bertram et al., 2019), directly addressing the productivity deficit that has constrained housing supply for decades.

Despite strong policy momentum and clear potential, widespread MMC adoption in Australia remains limited. MMC is not driven by technological innovation alone; it demands a shift in how the built environment workforce thinks, coordinates, and operates across the entire value chain. This challenge has been well documented in comparable international contexts (Farmer, 2016). MMC requires new business models, emerging occupations, and hybrid skill sets that differ from those underpinning traditional construction practice (Li et al., 2025; Onyia, 2025). Nevertheless, existing education and training systems are not configured to produce the workforce MMC requires, creating a structural bottleneck that constrains adoption regardless of policy intent or industry appetite.

This Building 4.0 CRC project was designed to address this gap by investigating the workforce implications and skill needs essential for widespread adoption of MMC within the Australian built environment sector. The overarching aim was to deliver evidence-based recommendations to guide workforce development, training provision, and education reform. As illustrated in Figure 1, the research was structured into three stages. Stage 1 benchmarked Australia's current MMC landscape against international best practices; Stage 2 mapped evolving MMC skill demands across the design, manufacturing, and assembly sectors; and Stage 3 evaluated the capacity of the Vocational Education and Training (VET) and Higher Education (HE) sectors to meet these emerging needs. A detailed overview of the research methods and data sources underpinning each stage is provided in Appendix I.

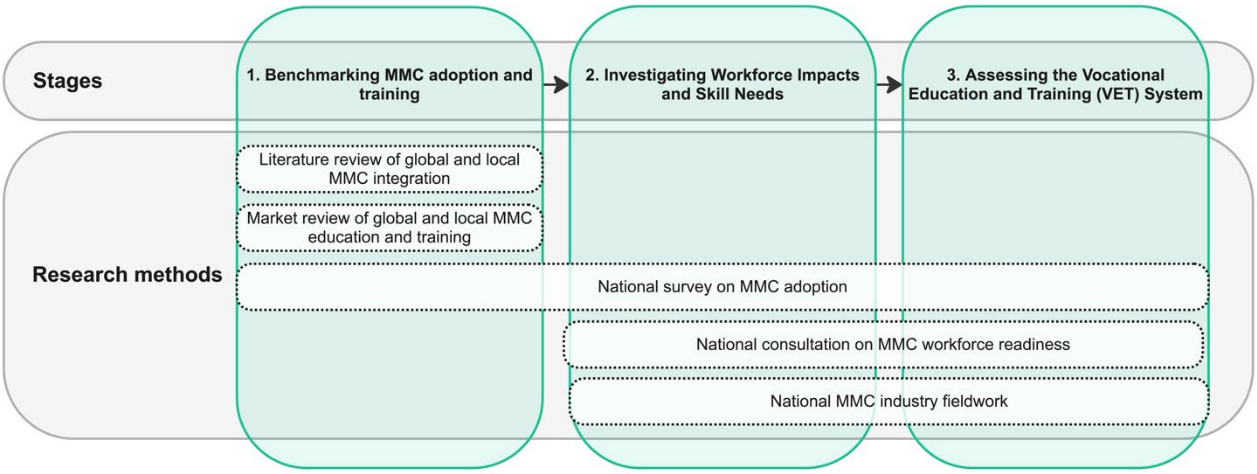

Figure 1 Project Overview

2. INTERNATIONAL BENCHMARKING OF MMC WORKFORCE DEVELOPMENT AND TRAINING

As MMC has gained momentum globally, governments and industry bodies have developed dedicated policies, strategies, and workforce development initiatives to support its adoption, often embedded within broader built environment workforce development agendas that, while not exclusively focused on MMC, address closely related dimensions (e.g., digitalisation and sustainability). These policy settings and strategic frameworks directly shape the scope, design, and accessibility of MMC training offerings, making international benchmarking a key starting point for understanding what effective workforce development for MMC can and should look like in the Australian context.

This section presents findings from an international benchmarking of MMC workforce development and training programs, examining both the breadth and depth of MMC training provision globally. The analysis begins with a market review mapping the extent and character of MMC-related training offerings across international contexts, before drawing on in-depth country case studies—including Sweden, Germany, the United Kingdom, Singapore, and the United States—to explore the specific strategies, policies, and governmental initiatives that have shaped MMC workforce development in each setting. The section concludes with a synthesis of cross-country lessons.

2.1. Market review of international MMC training programs

A market review was undertaken to map the structure, accreditation, delivery mechanisms, and governance of MMC-related training within each country's national, vocational, and higher education systems. The review sought to identify how MMC knowledge and skills are currently integrated into both formal and informal learning pathways, providing a comparative baseline. The full search methodology, including the complete list of search terms and extraction criteria, is provided in Appendix I. For more details, see Solin et al. (2025).

A total of 76 training programs were identified across ten country categories: the United Kingdom, Singapore, Sweden, the United States, Hong Kong, Canada, New Zealand, Germany, Ireland, and an international category, including multiple locations. The United Kingdom led with 17 offerings (22.4%), followed by Singapore with 13 (17.1%), while the United States and Sweden each contributed 10 offerings (13.2%). Within this dataset, 46 offerings (60.5%) explicitly focused on MMC, while the remaining 30 (39.5%) were MMC-adjacent—addressing closely related skills and technologies without explicit MMC framing (Figure 2).

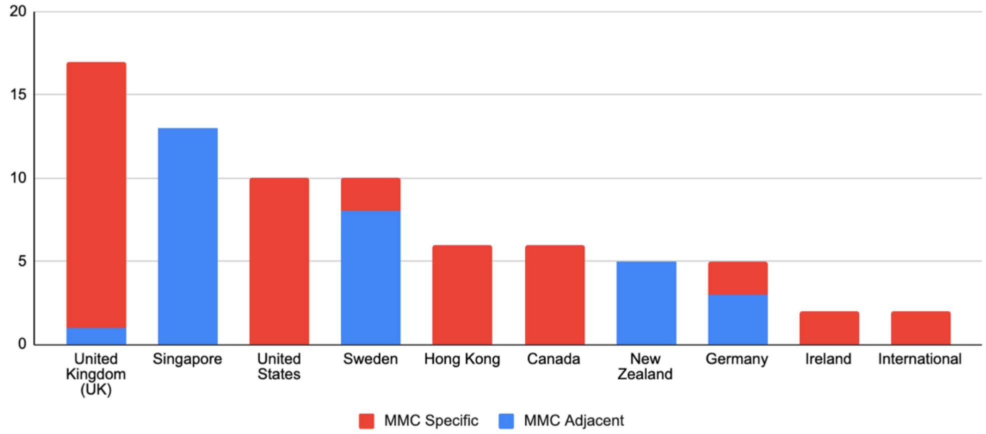

Figure 2 Specificity of MMC training offerings across countries.

Formal qualifications, including certificates and accredited, constituted the largest proportion of identified offerings, accounting for 42.6% of the total. Informal offerings, such as workshops and short courses, represented the second-largest category with 18 programs (23.7%). Micro-credentials and Continuing Professional Development (CPD) each comprised 7 offerings (9.2%), while the remaining categories—including commercial offerings, training resources, single-unit programs, and unclassified programs—each comprised only two to three instances (Figure 3).

The majority of programs were delivered through VET providers, accounting for 44 offerings (57.9%). Universities contributed 12 programs (15.8%), followed by industry associations with 11 (14.5%) and private providers with 6 (7.9%). Governmental bodies and individual employers provided 2 (2.9%) and 1 (1.5%) offerings, respectively (Figure 3).

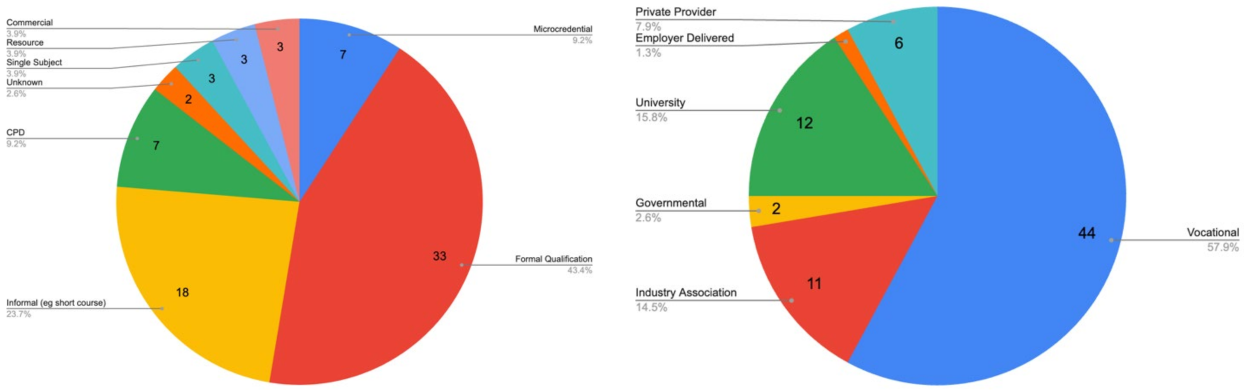

Figure 3 Training type and provider.

In-person delivery was the most prevalent delivery mode, observed across 24 offerings (31.6%), followed by online delivery with 20 programs (26.3%). Work-based learning was utilised in 11 offerings (14.5%), while blended delivery—combining in-person and online, or in-person and work-based formats, each accounted for 6 offerings (7.9%). The delivery mode for 9 offerings (11.8%) was not specified. Notably, work-based and blended delivery modes were predominantly associated with formal qualifications, whereas informal offerings presented a wider range of delivery options.

As a single training offering could target multiple audiences, the following figures reflect primary orientations rather than mutually exclusive categories. Upskilling existing professionals (broadly characterised as white-collar workers) was the dominant focus, targeted by 43 programs (56.6%). Existing tradespeople were the focus of 16 offerings (21.1%), while 25 programs (32.9%) were specifically designed for new entrants to the field. The majority of new entrant-focused programs were formal qualifications delivered predominantly through in-person, work-based, and blended formats, with no exclusively online options identified in this category. Additional target audiences included general audiences and individuals seeking cross-skilling from other industries, each accounting for 3 offerings (3.9%), while the target audience for 5 programs (6.6%) could not be determined.

2.2. A cross-country comparison of MMC education offerings

Five countries were purposively selected to represent a diverse range of MMC workforce development approaches, reflecting varying stages of MMC adoption, levels of policy maturity, and educational system structures (Bertram et al., 2019). The selected countries (Sweden, Germany, the United Kingdom, Singapore, and the United States) were chosen to capture a broad spectrum of experiences and institutional arrangements, from nations with highly mature and deeply embedded MMC frameworks to those where industrialised building is gaining momentum but has yet to achieve mainstream adoption. The methodology underpinning this cross-country analysis, including the document review approach and data extraction framework, is detailed in Appendix I.

Table 1 summarises key MMC-related workforce development initiatives and associated training offerings by country, providing a structured overview of the cross-country landscape before the in-depth national analyses that follow.

Table 1 Comparative overview of MMC workforce development and training.

Country	Examples of MMC-related workforce development initiatives	Examples of MMC training offerings
Sweden	• The Byggbranschens Utbildningscenter by Swedish Construction Federation • Smart Built Environment by RISE, Dalarna University, and Vinnova. • Strengthening the Governance of the Swedish Skills System Project by OECD	• Wood First – building sustainable by RISE Research Institutes of Sweden • Sustainable Production Development Industry 4.0 by YH Academy • Production Technology Digitalisation and Computer-Aided Manufacturing by Skellefteå Kommun
Germany	• Serielles und Modulares Bauen 2.0 (Serial and Modular Construction 2.0) by the Federal Association of German Housing and Real Estate Companies • Vocational Education and Training 4.0 by the Federal Ministry of Education and Research (BMBF) and the Federal Institute for Vocational Education and Training (BIBB).	• Production Planner by REFA. • Bachelor Professional - Intelligent Building Technology/System Networking. • Professional specialist - intelligent building technology/system networking.
United Kingdom	• Apprenticeship Levy by DfE • Growth & Skills Levy by Skills England • Local Skills Improvement Plans (LSIPs) by DfE • Employer Network-Future Skills Training by CITB • Homebuilding Skills Hubs by DfE, Skills England, CITB, The National House-Building Council (NHBC)	• Offsite for Everyone by Supply Chain Sustainability School • Offsite Ready, funded by CITB • ProQual Level 2 NVQ Certificate in Construction using Off-site Manufactured Assemblies (Construction) • ProQual Level 2 NVQ Diploma in Construction using Off-site Manufactured Assemblies (Construction) • Pearson BTEC Level 4 Higher National Certificate in Modern Methods of Construction for England • Pearson BTEC Level 5 Higher National Diploma in Modern Methods of Construction for England
Singapore	• Built Environment Industry Transformation Map (ITM) and BuildSG Transformation Fund (BTF) by BCA. • Construction Productivity and Capability Fund (CPCF) by BCA. • Productivity Innovation Project (PIP) Incentive Scheme by BCA. • iBuildSG Joint Scholarship and Sponsorship Scheme by BCA. • Skills Framework for the Built Environment by SSG, WSG, and BCA.	• Diploma in Construction Engineering (Digital) by BCAA. • Specialist Diploma in Virtual Design & Construction (SDVDC) by BCAA. • Specialist Diploma in Integrated Project Management (SDIPM) BY BCAA. • Higher Nitec in Integrated Mechanical & Electrical Design by ITE. • Higher Nitec in Civil & Structural Engineering Design by ITE.
United states	• Transportation Education Development and Deployment program (TEDP) and the Highway Construction Training Program (HCTP) • Government-registered apprenticeship programs (GRAPs) by ABC	• Manufactured Construction Technology by NCCER • Industrialised Construction Certificate Program by California Polytechnic • Project Management in Industrial Construction Certificate by Louisiana State University (LSU) - Baton Rouge

Sweden

Sweden has positioned itself as a global leader in industrialised house-building, with over 80% of its residential market utilising these methods (Lessing & Brege, 2018). This maturity of adoption has fostered an organic approach to MMC workforce development that reflects the country's long industrialisation trajectory rather than a response to a discrete policy moment. Historically, landmark initiatives such as Miljonprogrammet—designed to rapidly expand housing supply—alongside evolving timber building regulations, facilitated the gradual industrialisation of the Swedish construction industry. This incremental shift cultivated a tradition of collective knowledge sharing in off-site construction, thereby establishing a knowledge base for MMC (Maxwell & Aitchison, 2016).

Building on this historical foundation, the Swedish government's overarching housing policy framework emphasises the long-term sustainable management of natural resources and energy. This has directly influenced workforce development priorities, driving the creation of targeted training offerings in sustainable building (see Table 1). A notable example is RISE Research Institutes of Sweden, a state-owned institute that has developed micro-credentials in modern timber and wooden house construction, while actively collaborating with industry and academia to generate applied knowledge in advanced manufacturing, digital design, and smart buildings, all foundational to MMC practice.

Productivity challenges within the Swedish construction sector have further prompted strategic investment in digitalisation as a key enabler of growth and a direct contributor to national climate goals (Hermansson & Song, 2024). This emphasis has translated into a significant focus on cultivating digital capabilities within the built environment workforce, most notably through the Smart Built Environment program. This government-supported initiative fosters collaboration among universities, vocational schools, and industry partners, developing digital skills and knowledge aligned with the demands of a smart and industrialised built environment sector (Hamon et al., 2025).

A distinctive feature of Sweden's approach, emerging clearly from the market review, is the differentiation in training provision across off-site and on-site production environments. Given the maturity of its off-site manufacturing sector, specialised training for factory-based production is largely embedded within broader manufacturing and engineering programs rather than construction-specific pathways. Sweden's Higher Vocational Education system (Yrkeshögskola) offers relevant examples, including programs such as 'Sustainable Production Development Industry 4.0' and 'Production Technology Digitalisation and Computer-Aided Manufacturing'—qualifications developed in close industry cooperation that emphasise digitally enabled and computer-aided manufacturing without a narrow construction focus. By contrast, on-site construction training, including processes related to cast-in-place concrete and site management, remains integrated within traditional construction pathways, such as those delivered by Byggbranschens Utbildningscenter (BUC), the training arm of Byggföretagen, the Swedish Construction Federation.

Despite these strengths, Sweden continues to face persistent skills shortages and mismatches, challenges compounded by its decentralised skills development system, where fragmented governance across regions and sectors limits the coordinated and timely response that rapidly evolving industries like MMC demand (OECD, 2024). In response, targeted systemic initiatives such as Strengthening the Governance of the Swedish Skills System have been introduced to improve collaboration and coordination across government agencies, ministries, regions, and industry stakeholders, with the aim of improving the responsiveness and coherence of the national skills ecosystem (OECD, 2024).

In summary, Sweden's leadership in MMC workforce development is underpinned by decades of sectoral maturity, strong governmental commitment to sustainability and digitalisation, and deep industry-academia collaboration. Rather than operating through a centralised, MMC-dedicated body, the Swedish approach integrates MMC-relevant digital, manufacturing, and interdisciplinary capabilities into existing and evolving VET and HE pathways (Maxwell & Aitchison, 2016). The primary ongoing challenges lie in addressing persistent skills shortages and ensuring that workforce development systems adapt with sufficient agility to the rapid pace of technological change.

Germany

Germany is increasingly embracing MMC as a strategic response to persistent challenges within its construction sector. While traditional on-site methods continue to dominate, modular and prefabricated approaches are gaining traction, driven by chronic skilled labour shortages, ambitious housing targets fuelled by urbanisation and migration pressures, and stringent sustainability obligations (Koch et al., 2017). Reflecting this momentum, industry-led initiatives such as Serielles und Modulares Bauen 2.0 (Serial and Modular Construction 2.0), promoted by the Federal Association of German Housing and Real Estate Companies, position serial and modular construction as a pathway to faster delivery, cost efficiency, consistent quality, and the creation of affordable housing at scale.

Central to Germany's MMC strategy is the recognition of digitalisation as a key productivity enabler and an integral driver of industrialised building adoption (Bundesarchitektenkammer, 2022).This is demonstrated by the national Building Information Modelling (BIM) mandate, which made Building Information Modelling compulsory for public infrastructure projects in 2021 and for public building projects by the end of 2022. In direct response to these digital imperatives, the Federal Ministry of Education and Research (BMBF) and the Federal Institute for Vocational Education and Training (BIBB) jointly launched the Vocational Education and Training 4.0 initiative. This cross-sectoral effort seeks to examine how existing qualification structures and competency frameworks must be redesigned to equip the workforce for digitally enabled industries, including construction. This policy direction is also reflected in the development of formal qualifications such as the Bachelor's Professional and Professional Specialist in Intelligent Building Technology and System Networking, which exemplify the growing integration of digitalisation into vocational and professional construction qualifications.

Germany's approach to MMC workforce development is deeply embedded within its renowned dual vocational training system. This model combines structured workplace-based learning with part-time vocational education, facilitating relatively seamless transitions into the labour market (Wolter, 2023). This system, widely regarded as a global benchmark for industry-ready workforce development, provides the institutional foundation through which MMC-relevant capabilities are cultivated. These capabilities are not delivered through dedicated MMC qualifications but are instead integrated across cross-disciplinary programs that draw on Germany's strong manufacturing heritage. Foundational competencies in production management, process optimisation, lean principles, and industrialised fabrication are embedded throughout existing VET and HE pathways. Qualifications such as the Arbeitsplanungsingenieur/in (Industrial Engineer/Production Planner) exemplify this approach, equipping graduates with the cross-disciplinary expertise to coordinate projects from early design stages through to industrialised fabrication. Organisations such as REFA further complement this landscape by providing specialised training in work design and process optimisation, directly addressing the production and process management capabilities that MMC demands.

In summary, Germany shares important structural similarities with Sweden in that MMC-related workforce development is embedded within existing training frameworks rather than addressed through explicitly labelled MMC programs. The system operates in a decentralised manner, which means there is no single national body overseeing construction workforce policy. Yet, central government initiatives provide clear strategic direction on digitalisation and sustainability, within which regional and institutional actors implement workforce development responses. This decentralised, still strategically coordinated approach, anchored by the dual vocational training system and the country's deep manufacturing expertise, positions Germany well to scale MMC adoption and sustain a capable and adaptable built environment workforce.

United Kingdom

The UK has identified MMC as a central pillar of its response to an ambitious housing agenda targeting the delivery of 1.5 million high-quality homes and improved access to affordable housing (Department for Education, 2024). Despite strong policy commitment, MMC adoption has remained limited, with workforce capability identified as a primary constraint (Farmer, 2016). MMC demands skills and ways of working that differ from traditional construction methods, and the absence of a sufficiently developed MMC-oriented workforce development system has been widely recognised as a critical barrier to scaling adoption (Peters et al., 2023). In response, two governmental bodies have been instrumental in driving workforce development efforts: the Department for Education (DfE) and the Construction Industry Training Board (CITB).

The DfE, now operating through the newly established Skills England, is responsible for providing strategic frameworks and policy direction to address national, regional, and sectoral skills gaps (Department for Education, 2024). Apprenticeships have historically been the cornerstone of DfE-led workforce development; however, evidence of declining apprenticeship starts following the introduction of the Apprenticeship Levy raised concerns about the effectiveness of this model in attracting sufficient new entrants to the trades (House of Lords Youth Unemployment Committee, 2021). This context contributed directly to the creation of the Growth and Skills Levy, which came into effect in April 2025. Led by Skills England, the levy is designed to support more flexible and skills-focused training aligned with national priorities, including housing delivery targets, making MMC-related training an anticipated key component. While 50% of levy funds must continue to be directed toward apprenticeships, the remaining 50% can now fund a broader range of approved programs, including shorter-duration ‘bolt-on’ courses and more agile apprenticeship formats better suited to rapidly evolving sectors such as MMC (Department for Education, 2025b). Given that Skills England was formally established only in June 2025, its long-term impact remains to be observed. Before its establishment, the DfE introduced complementary initiatives such as the Local Skills Improvement Plans (LSIPs) and the associated Local Skills Improvement Fund (LSIF), designed to make post-16 technical education and training more employer led. With a specific focus on net-zero and digitalisation skills in construction assembly, the LSIF has, for instance, supported the development of the first dedicated MMC training facility apprenticeship in the UK.

The CITB, funded by industry levy contributions, has played a parallel and complementary role in advancing MMC workforce development. On the research side, the CITB has made significant contributions to understanding the demand for MMC skills and their implications for the housing construction workforce (CITB, 2019; Pye Tait Consulting, 2017). It has also translated this evidence base into practice by directly funding training initiatives such as Offsite Ready and Offsite for Everyone, targeting critical capability gaps in offsite management, logistics, and broader MMC applications. Despite these contributions, the CITB has faced criticism regarding its capacity to adapt to emerging technologies and methods, including MMC, digital construction, and net-zero skills, and to channel levy funds efficiently toward these areas (Department for Education, 2025a). In response, new initiatives such as the Employer Network-Future Skills Training program and the Homebuilding Skills Hubs have been introduced, designed to foster greater employer responsiveness, more targeted funding mechanisms, and the agile capability development that MMC integration demands.

A particularly significant finding from the UK market review is the extent to which this coordinated policy landscape has been directly translated into formally accredited MMC qualifications at vocational and technical levels. This feature distinguishes the UK from most other countries examined. Nationally accredited qualifications, developed by third-party awarding bodies including ProQual, NOCN, GQA, and Pearson, have been established across a range of qualification levels, creating structured and portable learning pathways for MMC. While these awarding bodies set and assure educational standards, the financial underpinning for training delivery flows primarily from the government initiatives described above, underscoring the centrality of public investment to the UK’s MMC training ecosystem.

In summary, the UK is pursuing a distinctly centralised and coordinated approach to MMC workforce development, driven by the DfE through Skills England and supported by the CITB. The Growth and Skills Levy signals a meaningful shift toward more flexible, agile, and MMC-aligned training provision, while the development of nationally accredited MMC qualifications establishes clear and portable learning pathways across the sector. These efforts represent a top-down, policy-driven strategy aimed at building the skilled workforce necessary to scale MMC adoption and meet the UK's housing delivery ambitions.

Singapore

Singapore has emerged as one of the most prominent adopters of MMC globally, with its built environment industry undergoing a profound transformation toward industrialisation driven by the pressures of land scarcity, acute labour constraints, and an unwavering governmental commitment to productivity and quality (Liu et al., 2023). This transformation has been pursued primarily through Design for Manufacturing and Assembly (DfMA) and Prefabricated Volumetric Construction (PVC), and has been shaped by a highly centralised, government-led approach that distinguishes Singapore from most other countries examined.

The institutional architecture underpinning this transformation is the Built Environment Industry Transformation Map (ITM), coordinated by the Building and Construction Authority (BCA). Initially launched as two separate maps (i.e., the Construction ITM in 2017 and the Real Estate (Facilities Management) ITM in 2018), these were subsequently unified into the Built Environment ITM in 2022. The latter established a holistic value-chain roadmap for industry transformation. Organised around three pillars—Integrated Planning and Design, Advanced Manufacturing and Assembly, and Sustainable Urban Systems—the ITM places strong emphasis on principles central to MMC, including DfMA, digital fabrication, and efficient module installation, even without explicitly branding its vision as MMC (Liu et al., 2023). To operationalise these priorities, a suite of governmental funding schemes has been established, including the BuildSG Transformation Fund, the Construction Productivity and Capability Fund (CPCF), and the Productivity Innovation Project (PIP) Incentive Scheme. These mechanisms not only mandate and incentivise MMC adoption but also actively support workforce development through targeted initiatives such as the iBuildSG Scholarship and Sponsorship programs.

Complementing this policy infrastructure is the Skills Framework for the Built Environment, jointly developed by SkillsFuture Singapore (SSG), Workforce Singapore (WSG), and the BCA (SkillsFuture Singapore, 2020). This framework provides a mapping of sector data, career pathways, occupational roles, and the technical and critical core competencies required to meet the objectives of the Built Environment ITM. Of particular relevance to MMC, the framework explicitly prioritises emerging skills in computational design, DfMA, Design for Maintainability (DfM), Integrated Digital Delivery (IDD), and Smart Facilities Management. This framework provides a structured and evidence-based foundation for aligning training provision with industry transformation goals.

As in other countries examined, digitalisation is deeply intertwined with Singapore's MMC strategy, functioning not as a parallel agenda but as a foundational enabler. Central to this is the concept of Integrated Digital Delivery (IDD), which aims to achieve seamless information flow and enhanced collaboration across the entire built environment value chain, from initial design through to long-term facility management. The government actively promotes technologies such as BIM, Virtual Design and Construction (VDC), and advanced robotics, with this emphasis clearly reflected in the training offerings identified through the market review (see Table 1). Programs developed by the BCA Academy, including the Diploma in Construction Engineering (Digital) and the Specialist Diploma in Virtual Design and Construction (SDVDC), exemplify the integration of digital capabilities into formal construction qualifications. This commitment extends to post-secondary technical qualifications, with Higher Nitec programs such as those in Integrated Mechanical and Electrical Design and Civil and Structural Engineering Design, embedding digitalisation as a core component of practical and vocationally oriented construction education.

In summary, Singapore's approach to MMC workforce development is distinguished by its highly centralised, government-led character and its sophisticated alignment of policy, funding, skills frameworks, and training provision around a coherent industry transformation agenda. The integration of DfMA, digitalisation, and sustainability across institutional layers—supported by dedicated bodies such as the BCA Academy and anchored by the Skills Framework for the Built Environment—positions Singapore as a global exemplar of a coordinated, skills-first approach to MMC workforce development (Joo, 2025).

United States

The US built environment industry is undergoing a significant transformation, driven by growing infrastructure investment, surging demand for housing, and the broader energy transition (Duggan & Sieffert, 2023). The potential for repurposing commercial real estate into residential units has further amplified interest in more efficient and scalable delivery approaches, including off-site construction (Biörck et al., 2020). However, this period of opportunity is unfolding against a backdrop of deepening workforce pressures. An ageing construction workforce, persistent skilled labour shortages, and declining rates of younger workers entering the trades have created acute supply-side constraints, contributing to average wage increases exceeding 20% since early 2020 and placing sustained pressure on industry profit margins and long-term growth (Duggan & Sieffert, 2023).

The US response to these workforce challenges combines government-funded programs with industry-driven initiatives, operating within a predominantly decentralised approach. Federal agencies—including the Department of Labor (DOL), Department of Energy (DOE), and Federal Highway Administration (FHWA)—provide substantial grant funding through programs such as the Transportation Education Development and Deployment Program (TEDP) and the Highway Construction Training Program (HCTP), supporting a broad range of construction training activities. Industry associations play a parallel and significant role. Associated Builders and Contractors (ABC) members invested an estimated $1.6 billion in workforce development in 2023 alone, while the Associated General Contractors of America (AGC) delivers education covering BIM and lean construction principles. Nevertheless, neither government programs nor industry association initiatives have placed explicit and sustained focus on off-site construction or MMC-specific skill development, a notable gap relative to the other countries examined.

Workforce entry and skill development pathways in the US are predominantly structured around employer-led partnerships and registered apprenticeship models. Sponsored by individual companies, industry associations such as ABC and AGC, or trade unions including the North America's Building Trades Unions (NABTU), registered apprenticeships are widely valued for their earn-while-you-learn model, which combines paid on-the-job training with classroom instruction and reduces upfront costs for both employers and workers. Providing a degree of national consistency across this otherwise fragmented landscape, the National Center for Construction Education and Research (NCCER) functions as a widely recognised standard-setting and curriculum development body. Notably, NCCER has developed a specific Manufactured Construction Technology curriculum addressing modular prefabrication systems (one of the few examples of explicitly MMC-oriented training provision identified in the US context).

In summary, the US approach to MMC workforce development is characterised by a decentralised, employer-led model in which significant investment in general construction training coexists with a limited and fragmented focus on MMC-specific capabilities. Two structural challenges reinforce this limitation. First, a persistent cultural bias favouring university education over vocational pathways continues to constrain the pipeline of younger workers entering the trades. Second, traditional construction apprenticeships typically span three to five years, which represents a timeframe misaligned with the agile and rapidly evolving skill demands that MMC adoption requires. These factors position the US as a context where the conditions for MMC workforce development exist but remain insufficiently coordinated.

2.3. Key findings from benchmarking MMC adoption and training

#102: Skills and Training Implications of Modern Methods of Construction: Across Design, Manufacture and Assembly

Global interest in MMC is accelerating within the built environment industry, driven by the urgent need to address long-standing productivity deficits and, increasingly, by ambitious governmental housing targets that traditional construction methods have proven unable to meet. This momentum does not operate in isolation. It is intrinsically linked to two other transformative forces shaping the sector: digitalisation and sustainability. Digitalisation functions as a powerful enabler of MMC, facilitating advanced design, precision manufacturing, and the seamless coordination across the value chain. MMC, in turn, serves as a critical pathway toward sustainability objectives, offering optimised resource utilisation, reduced construction waste, and improved operational efficiency across the building lifecycle.

MMC is not, however, a new phenomenon. In countries such as Sweden and Germany, industrialised building methods have been embedded within mainstream construction practice for decades, generating a depth of sectoral experience that has shaped how workforce development is structured. In these mature contexts, MMC-relevant capabilities have accumulated organically through decades of practice, industry collaboration, and incremental qualification development. This organic approach contrasts with the deliberate, policy-driven workforce interventions characteristic of countries where MMC adoption is more recent.

Across all countries examined, the shift toward MMC consistently generates a distinct and evolving set of workforce demands. Key competencies include production and process management, meticulous logistics coordination between offsite fabrication and onsite assembly, and deep familiarity with DfMA principles. Digital literacy (including BIM proficiency, digital fabrication, and integrated delivery platforms) is increasingly recognised as a foundational rather than supplementary capability across all phases of the project lifecycle.

The cross-country comparison reveals that nations have pursued markedly different strategies in response to these workforce demands, reflecting their distinct institutional arrangements, policy contexts, and stages of MMC maturity. Sweden and Germany represent mature, organically evolved systems in which MMC-relevant capabilities—e.g., production management, lean principles, and cross-disciplinary coordination—are embedded within existing VET and HE qualification frameworks rather than addressed through explicitly labelled MMC programs. The UK has pursued a more deliberate and centralised approach, translating policy ambition into nationally accredited MMC qualifications and more flexible funding mechanisms designed to accelerate skills acquisition. Singapore stands apart as perhaps the most strategically coherent example, having proactively built an integrated ecosystem, based on policy mandates, funding schemes, skills frameworks, and dedicated training institutions. Training design targets DfMA and digitalisation as the twin pillars of built environment productivity transformation. The United States, by contrast, represents a highly decentralised and employer-led model where significant investment in general construction training coexists with a limited and fragmented focus on MMC-specific capabilities, constrained further by cultural and structural barriers to vocational education.

These findings suggest that effective MMC workforce development is not reducible to the creation of new qualifications or training programs alone. Integrated workforce development frameworks require the deliberate alignment of policy intent, institutional architecture, funding mechanisms, and training provision around a coherent and long-term vision for industry transformation.

3. MMC ADOPTION AND WORKFORCE CAPABILITY IN THE AUSTRALIAN CONTEXT

While international experience provides a valuable comparative lens, understanding the specific workforce challenges and capability requirements associated with MMC adoption in Australia demands direct empirical investigation of the domestic context. This section draws on findings from three complementary data sources (Appendix I): a national survey of 43 MMC-engaged companies; 20 semi-structured interviews with senior industry practitioners, educators, and policymakers spanning the built environment value chain; and observational fieldwork conducted at 21 companies and industry bodies across the five mainland Australian states. These methods capture both the macro-level patterns shaping Australia's emerging MMC landscape and the micro-level realities of workforce transformation as experienced by the organisations and workers navigating it.

The section is organised into three parts. The first provides an overview of MMC adoption and the current industry landscape in Australia, drawing primarily on national survey data to characterise the scale, drivers, barriers, and training investment patterns of MMC-engaged companies. The second presents qualitative findings on MMC skill requirements across the design, manufacturing, and assembly phases, identifying the specific capabilities that distinguish MMC from traditional construction practice and synthesising these into a skills framework for MMC jobs. The third examines emerging occupational roles and hybrid profiles arising from MMC adoption, including multi-skilled trades and grey-collar workers, whose requirements transcend conventional qualification boundaries and present challenges for existing education and training frameworks. The section concludes with an overview of the most critical skill requirements for MMC uptake across the Australian built environment value chain.

3.1. MMC adoption and industry landscape in Australia

Australia's interest in MMC techniques as a response to housing supply challenges is not new. As early as the 1950s, government-commissioned studies were exploring the potential of prefabricated and industrialised building methods to accelerate housing delivery, with formal investigations continuing into the 1970s (Australian Government Task Force, 1974; The Advertiser, 1950). While this interest was never fully translated into sustained industry transformation, it established a foundation of policy awareness that has periodically resurfaced in response to recurring housing and productivity pressures. Interest intensified significantly in the early 2000s as international evidence of MMC's potential began to accumulate and Australian researchers and industry bodies started engaging more seriously with offsite manufacturing as a strategic pathway for the sector (Blismas & Wakefield, 2009).

Today, that longstanding policy interest has translated into concrete governmental action. Driven by the environmental, social, and economic challenges outlined earlier in this report, and accelerated by the ambitions of the National Housing Accord, Australian state and federal governments have begun actively promoting and procuring MMC as a central component of their housing delivery strategies. Table 2 summarises key governmental MMC programs and initiatives currently operating across Australian jurisdictions.

Despite this growing policy momentum, reliable data on the actual level of MMC adoption in Australia remains limited. The most widely cited estimate places prefabricated and offsite construction at approximately 5% of Australian construction activity, a figure that has remained broadly consistent across industry, academic, and commercial sources for over a decade (Bertram et al., 2019; Zhang et al., 2022). McKinsey's 2019 report specifically estimated that modular construction represented around 5% of new homes in Australia, drawing on Housing Industry

Association (HIA) data, while prefabAUS's most recent estimates suggest modest growth toward 7% of total construction activity. Academic research corroborates this range, with Zhang et al. (2022) placing prefabricated construction at roughly 5% of the Australian market by value.

Table 2 Key Australian government MMC programs and initiatives

Jurisdiction	Program/Initiative	Responsible Body	Focus
Queensland	QBuild MMC Program	Department of Housing	Procurement of modular and prefabricated social housing; building supplier capability and pipeline certainty.
New South Wales	Homes NSW MMC Program	Homes NSW	Accelerating social and affordable housing delivery through MMC; developing an open-source MMC framework to enable industry-wide standardisation of design, components, and procurement.
Victoria	Offsite Construction Guide	Victorian government	Practical guidance and decision-support tools for government departments and agencies, covering planning, design, and delivery of projects using MMC; aimed at building knowledge and understanding of offsite construction methods.

These figures must, however, be interpreted with considerable caution. The actual extent of MMC in Australian construction cannot be reliably determined from ABS data. This represents a structural measurement gap arising from the fact that offsite production is classified under manufacturing statistics rather than construction statistics, making systematic national tracking impossible within existing data collection frameworks (e.g., Productivity Commission, 2025). The widely circulated 3–7% range consequently functions more as an informed industry consensus than a statistically rigorous output, derived primarily from industry interviews rather than comprehensive national measurement. Most significantly, this figure has remained largely static for over a decade despite sustained policy advocacy, growing investment, and repeated calls for industry transformation. This stagnation reflects the depth and persistence of the structural barriers constraining MMC adoption in Australia.

It was precisely this absence of reliable empirical evidence on Australian MMC adoption patterns, company profiles, and workforce capability levels that motivated the national survey conducted as part of this project (Appendix I).

The Australian MMC sector: profile and adoption patterns

The national survey reveals an Australian MMC sector characterised by deep industry experience concentrated within a predominantly small-firm structure that significantly constrains capacity for investment and workforce development.

Table 3 Years of establishment and number of employees (n=43)

	Number of Employees					
Years of Establishment	0-19	20-49	50-199	200-499	500+	**Total**
Less than 3	7	1	0	0	0	**8**
3-5	2	0	0	0	0	**2**
6-10	1	0	0	1	0	**2**
11+	9	5	7	5	5	**31**
Total	**19**	**6**	**7**	**6**	**5**	**43**

Nearly half of respondents (46.5%) have been working with MMC for more than ten years (see Appendix II), and 72% of companies have been in operation for more than eleven years (see Table 3), indicating a sector with deep accumulated expertise rather than one populated primarily by new entrants or startups. This maturity coexists, however, with a predominantly small-firm structure.

With 44% of companies employing fewer than 20 people, small firms constitute the largest single group in the survey (Table 3). This characteristic has profound implications for workforce development, as small firms have limited capacity to release staff for training, absorb the costs of external programs, or develop in-house training materials without significant external support.

The sector is residential-led but broadly diversified (see Figure 4). Residential construction is the dominant context for MMC deployment, selected by 81% of respondents, but most organisations operate across multiple building types including education (56%), commercial (54%), mixed-use (49%), and healthcare (44%). This multi-sector profile suggests that Australian MMC companies develop adaptable capabilities and systems rather than narrow specialisations. This reflects and demands a broad and flexible workforce skill base.

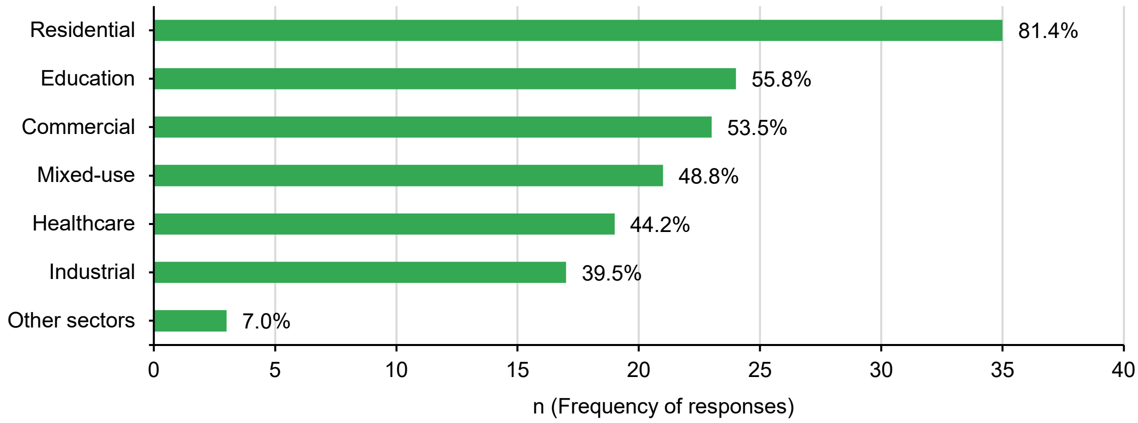

Figure 4 MMC sectors of operation (n=43)

Offsite approaches—referred to categories 1-5—dominate the MMC methods deployed, with three-dimensional volumetric pre-manufacturing the most prevalent (51%), followed by two-dimensional panelised pre-manufacturing (44%) and sub-assembly pre-manufacturing (40%); see Figure 5. Organisations rarely specialise in a single method. 23 different combinations of MMC types were reported across the survey, with the majority of companies deploying multiple approaches depending on project requirements (Appendix II). This technical diversity further amplifies the workforce capability challenge, as workers must be proficient across a range of processes, production systems, and delivery models rather than within a single standardised approach.

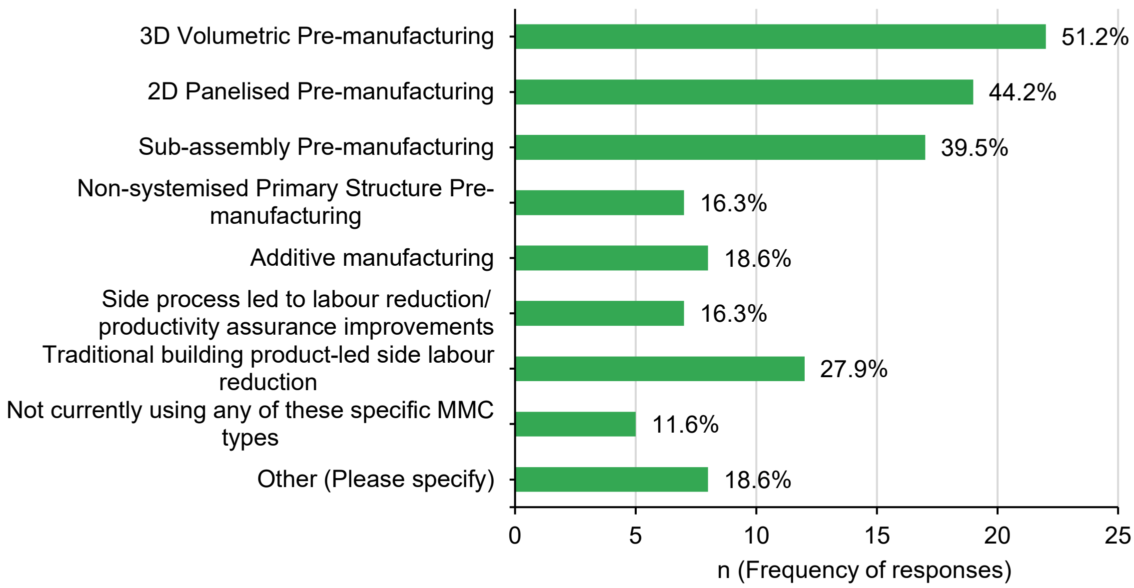

Figure 5 MMC type (n=43)

The Australian MMC sector: Drivers and barriers

Survey respondents identified a clear hierarchy of drivers and barriers that reveal the structural conditions shaping MMC adoption in Australia. The dominant drivers are operational and strategic rather than regulatory, see Figure 6: innovation (79%), efficiency and productivity gains (74%), improved quality (64%), and faster project delivery (62%) lead the rankings, reflecting an industry responding to intense market pressure and housing delivery imperatives rather than external mandates (Appendix III). Sustainability (60%) and addressing labour shortages (57%) round out the primary drivers, connecting MMC adoption directly to the environmental and workforce challenges that frame this project.

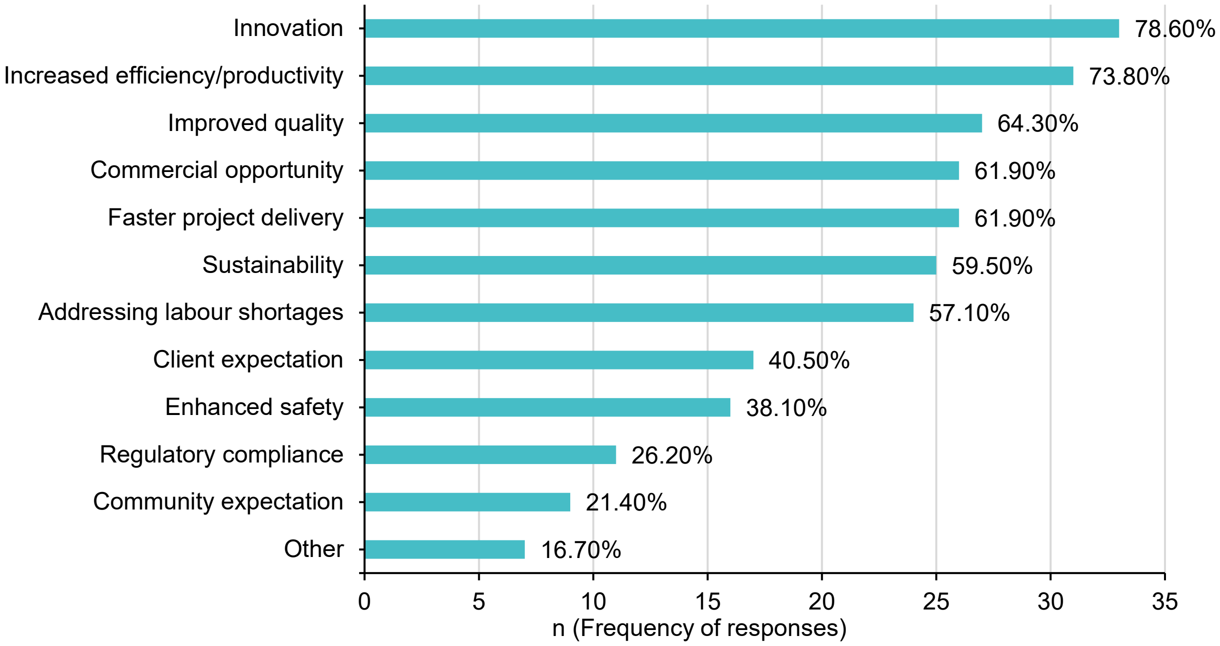

Figure 6 Drivers for adopting MMC (n=42)

The barriers reveal a similar pattern (Figure 7). The top three are human and financial rather than technical: resistance to change (78% agree or strongly agree), lack of workforce knowledge and capabilities (76%), and insufficient capital (76%). Regulatory uncertainty follows closely at 68%.

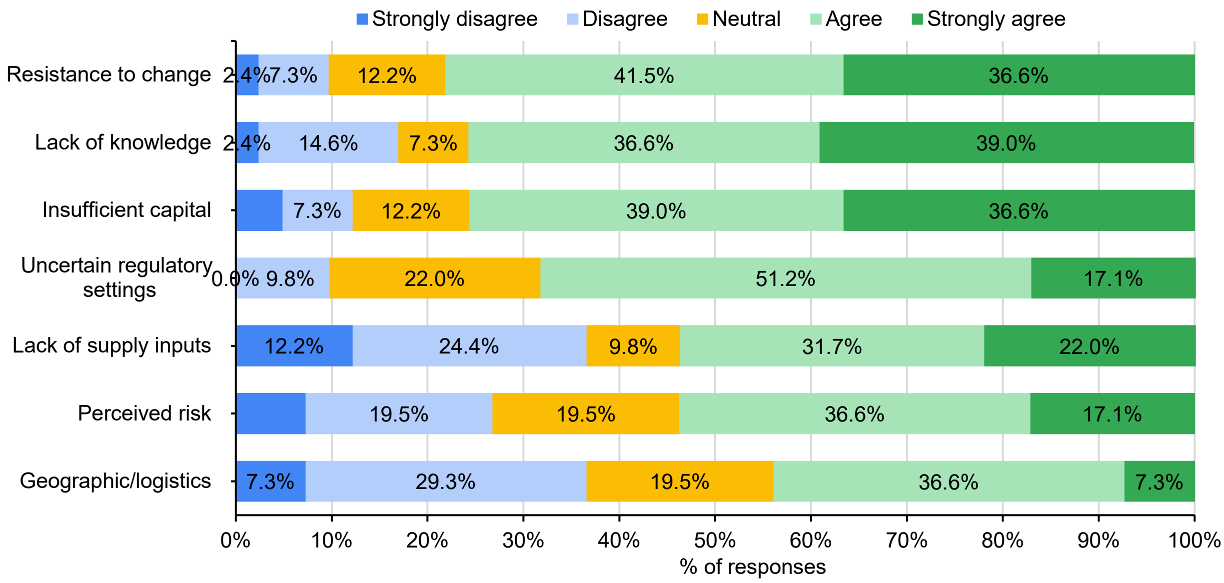

Figure 7 Perceived barriers to MMC adoption in Australia (n=41)

These barriers function as an interconnected system rather than isolated challenges, as evidenced by the survey's internal consistency analysis (Cronbach's $\alpha = 0.72$), which indicates that addressing any single barrier in isolation is unlikely to unlock meaningful growth without parallel progress across multiple fronts. Qualitative responses amplify this finding (Table 4), with respondents highlighting that policy and regulatory misalignment creates unnecessary delays, that design standardisation remains fragmented across jurisdictions, and that procurement systems continue to favour traditional methods.

Table 4 Thematic analysis of barrier-free text responses (n=24)

Thematic barrier	Mentions	Illustrative quotes
Cost and financial viability	7	"Unable to justify slight delta in bottom line in MMC vs Conventional" "Cost efficiencies need to be found within the tangible construction process"
Pipeline and certainty	7	"The difficulty in scaling up/down to meet changes in demand" "Uncertainty of continuing demand from government"
Regulatory barriers and misalignment	6	"Policy and regulatory misalignment – Building codes, zoning/planning requirements, and procurement rules are not designed with MMC in mind, creating unnecessary delays and costs" "To many 'standards' across different councils"
Platform-based design and standarisation	5	"There is also a lack of standardisation which makes MMC difficult." "Government authorities that prohibit complete standardisation."
Perception and quality concerns	4	"People still perceive it as lower in quality." "Perception of poor design outcomes with prefab and late consideration of prefab"
Skills and expertise gaps	3	"Federal and state skills agencies are not working together to create targeted MMC training pipelines, despite the well-known shortage of skilled trades." "Early design being led by those who do not understand MMC, creating expensive learning curves and lost time"
Market evidence and case studies	3	"Lack of successful case studies." "MCC is potentially better, faster & cheaper. All current disinformation is easily overcome using science & reason."
Procurement and tender bias	3	"Attempting to convert to or consider prefab too late in the project lifecycle." "Procurement bias towards traditional methods"
Industry fragmentation and coordination	2	"The primary barrier is the extraordinary disconnect and silo of skills and markets between the architectural industry and the construction industry" "Currently, responsibilities are split across planning, housing, infrastructure, skills & training, industry development, and procurement, yet these departments operate in silos."
Supply chain and manufacturing	2	"We can not manufacture enough. I am seeing a significant increase in manufactured buildings being imported into Australia at a low cost - this makes it very hard for new competitors to start in Australia." "Internal cannibalization from traditional delivery approaches"

These findings also reveal that the workforce dimension generates a paradox. While 57% of respondents cite labour shortages as a driver pushing them toward MMC, 76% simultaneously identify the lack of MMC-specific workforce capabilities as a barrier constraining adoption. Skills gaps therefore both motivate and limit the transition to MMC, meaning that without deliberate and coordinated workforce development investment, the pressure driving companies toward MMC will also prevent them from making that transition successfully.

The Australian MMC sector: Training investment

Despite widespread recognition of MMC skill gaps, only 58% of organisations have invested in any MMC-related training or professional development, leaving 42% with acknowledged capability deficits and no active investment to address them. This disconnect between recognised need and investment action points to barriers beyond awareness, including resource constraints inherent to a small-firm-dominated sector, unclear training pathways, uncertain returns on investment, and the absence of accessible and relevant MMC training programs in the Australian market.

Among the 23 organisations that have invested in training, internal capability development dominates, with 70% having developed their own in-house training programs or materials (see Figure 8). This high reliance on self-developed content reflects both the highly specialised nature of MMC knowledge and the absence of readily available and standardised training products externally. Government and industry training initiatives combined have been utilised by only 17% of investing organisations, pointing to a significant gap in accessible and relevant external training provision. These findings are consistent with the limited MMC-specific offerings identified through the market review presented in Section 3.1.

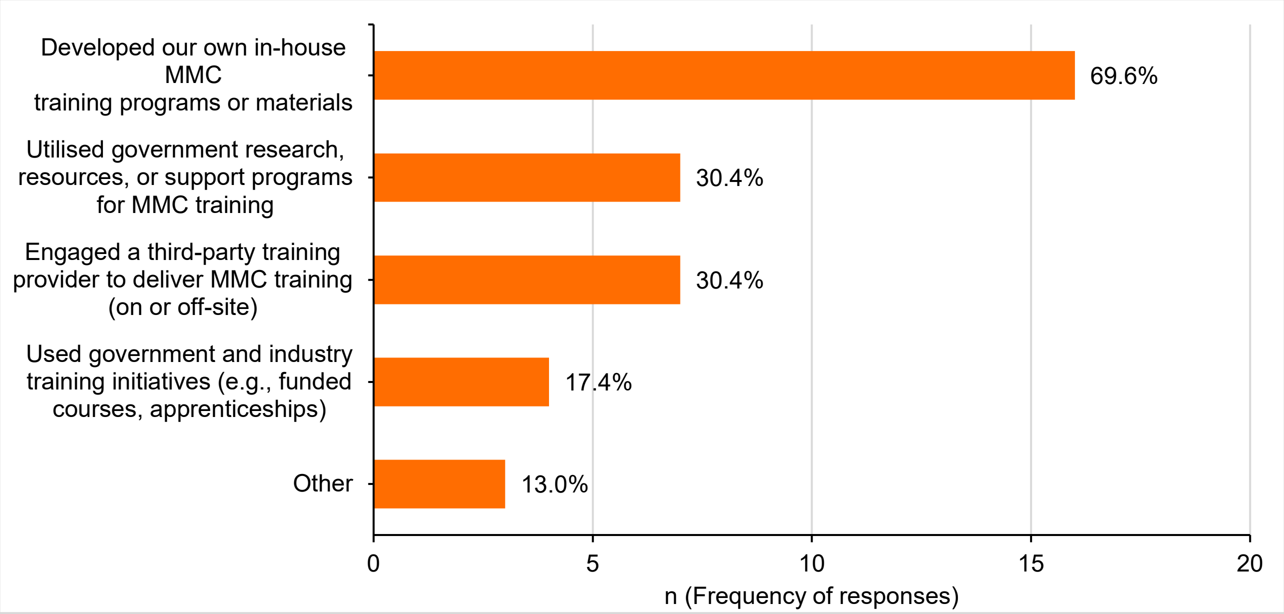

Figure 8 MMC Training initiatives (n=23)

As a result, these findings confirm that the Australian MMC sector is constrained by a structural workforce development gap that market forces alone are unlikely to resolve. The dominance of small firms, the absence of MMC training products, the fragmentation of government support across jurisdictions, and the paradox of skills gaps both driving and limiting the MMC transition all point toward the need for coordinated and systemic intervention.

3.2. MMC skill requirements across design, manufacturing, and assembly

Understanding MMC skill requirements in the Australian context requires situating them within the realities of a relatively young and still-maturing market. Australia's MMC sector is characterised by uneven capability distribution across the value chain. Knowledge of MMC processes among design professionals and builders remains limited (Ginigaddara et al., 2021; Ginigaddara et al., 2022), in part because traditional architecture, engineering, and construction education has not embedded principles that align with MMC, such as DfMA, lean production, and systems thinking. Manufacturers, by contrast, hold a comparatively stronger knowledge base, sustained in part by practitioners who have relocated from MMC-mature markets such as Germany and the UK, and by those transitioning from broader manufacturing industries into construction. This relative advantage has positioned manufacturers as de facto coordinators across much of the Australian MMC value chain. Nevertheless, manufacturer capability is itself uneven. While some operators ground their practice in process-oriented production systems consistent with industrialised building principles (Lessing, 2006), others continue to treat off-site construction as an extension of traditional construction, replicating project-based practices in a factory setting.

This uneven capability distribution produces a predictable coordination failure. When designers lack manufacturing knowledge and builders disengage from early decision-making, manufacturers absorb the full coordination burden regardless of whether they possess the project management capacity this expanded role demands. This dynamic directly shapes the workforce development priorities discussed across the following subsections, distinguishing the Australian context from more mature MMC markets.

Across all three groups, designers, manufacturers, and builders/main contractors, MMC skill requirements are not simply add-on competencies layered onto existing construction practice but reflect a different project delivery logic, one grounded in standardised systems, platform-based production, and process-oriented thinking across the entire value chain (Lessing, 2006). The following subsections synthesise qualitative findings from the national industry consultation and fieldwork, identifying the distinct capabilities MMC demands across design, manufacturing, and assembly/installation phases alongside foundational skills required across the full value chain. These are presented in summary form in Table 5, which provides an MMC skills framework organised by phase and skill area, drawing on both the qualitative findings reported here, and the persona profiles developed as part of this project (Appendix III). Throughout each subsection, illustrative participant accounts are used to evidence the skill requirements described in the narrative, with a dedicated table of quotes provided at the end of each phase.

Table 5 MMC skills framework across the value chain

Skill focus area	Foundational (All phases)	Design phase	Manufacturing phase	Assembly/ Installation phase
Mindset and orientation	Process-oriented mindset, recognising that design, manufacturing, and assembly continuously interact and inform one another throughout MMC delivery. This systemic interdependence requires anticipatory thinking.	DfMA mindset, designing for production and assembly rather than aesthetic or disciplinary logic alone.	Process discipline over reactive problem-solving; continuous improvement and root cause analysis.	Reconciling the millimetre-level precision of factory-manufactured components with the inevitable variability of site conditions, foundations, and existing structures.
Production thinking	Systems-thinking, understanding how decisions in one phase cascade through the full design-manufacture-assemble value chain.	Understanding of manufacturing constraints, module sizing, transportation limits, and assembly sequences.	Lean manufacturing principles, e.g., takt time, value stream mapping, pull scheduling, waste identification, and materials flow.	Sequencing, staging, and interface management between manufactured precision and site variability.
MMC typology knowledge	General awareness of MMC typologies (e.g., panelised, volumetric, hybrid, CLT) and how each product type's constraints and advantages differ.	Understanding of panel, volumetric, and hybrid MMC structural systems and their design implications.	Bill of Materials literacy across MMC product types; cost structures and production logic differing by typology.	Knowledge of connection systems, weatherproofing, and installation requirements specific to the MMC product type.
MMC principles	Understanding of the principles that distinguish MMC from traditional construction, including platform-based production, standardised systems, front-loaded decision-making, integrated logistics, and design freeze.	Understanding of DfMA, design freeze requirements, platform-based design, and how early design decisions determine manufacturing feasibility and programme.	Standardisation, platform thinking, and production system design, i.e., building repeatability into processes, components, and quality systems rather than solving problems project by project.	Understanding that installation sequences, tolerances, and interfaces are determined upstream, and that on-site improvisation signals a failure of earlier coordination rather than a normal working condition.

Skill focus area	Foundational (All phases)	Design phase	Manufacturing phase	Assembly/ Installation phase
Digital skills	Baseline comfort with digital work environments, cloud-based systems, and data-informed decision-making, with depth of fluency varying by qualification and role.	BIM proficiency and clash detection; early-stage BIM coordination across consultants; model-based documentation.	CNC operation and digital fabrication file interpretation; BIM-to-fabrication workflows; digital quality management (QA) systems including tablet, cloud-based, and other platform-based inspection, photographic evidence, and non-conformance recording tools.	Ability to read and navigate BIM models to verify installation sequences, connection details, and tolerances on site; tablet and QR-code guided installation; digital as-installed documentation; photographic and deviation records.
Quality management	Continuous improvement orientation grounded in data and evidence.	Resolving design problems upstream to prevent production errors; understanding design freeze and its cost implications.	Embedded quality checkpoints, non-conformance reporting, and traceability throughout production.	Quality management including pre-dispatch factory inspections at agreed hold points, on-arrival verification of manufactured quality, transport damage documentation, root cause attribution of defects across manufacturing, transport, and installation, and digital as-installed handover packages for certification.
Coordination and collaboration	Shared language and vocabulary across professional boundaries; explicit proactive communication.	Concurrent early-stage engagement with manufacturers from project inception; DfMA-informed documentation resolved to fabrication level. Early resolution of services coordination including which MEP elements are manufactured off-site, which require on-site installation, and how they interface with the structural system.	Coordination of multi-skilled operators across production stations, ensuring each scope is sequenced correctly and does not obstruct the next; integration of licensed trades at targeted points to supervise, complete, and certify hidden works before elements are closed; coordination across supply chain, logistics, and site delivery as an integrated system.	Coordination of subcontractors and licensed trades interfacing with manufactured elements on site; managing site readiness and access sequencing; ensuring compliance inspection and certification of embedded services is completed and documented before installation is finalised; and communication with the factory regarding production-phase deviations that may affect installation tolerances or services interfaces.
Regulatory and compliance awareness	Awareness of evolving regulatory frameworks for MMC, digital inspection, and certification across Australian jurisdictions.	NCC provisions for MMC product types; understanding of approval pathways and their differences from traditional construction.	Factory WHS frameworks distinct from site-based regulations.	AS/NZS structural connection standards applicable to MMC installation types; certification and digital evidence requirements.

Design phase skill requirements

The skill requirements of the design phase represent perhaps the most pronounced departure from those demanded by traditional construction practice. Rather than designing independently and deferring construction questions to the build phase, MMC demands that architects and engineers resolve manufacturing constraints, transportation limits, assembly sequences, and logistical dependencies at the point of design. This requires what participants consistently described not only as additional technical knowledge but as a different way of thinking about the relationship between design and production (see Table 6, illustrative quote a.1).

DfMA mindset emerges as the foundational design skill. Participants described it as the capacity to design with manufacturing and assembly outcomes in mind, emphasising that without this orientation, the efficiency gains that MMC promises cannot be realised (see Table 6, illustrative quote a.2). This mindset involves process engineering thinking, which refers to the capacity to interrogate design decisions against their functional purpose, asking how building elements will be manufactured and assembled alongside other established design considerations such as environmental sustainability and circularity, occupant comfort and liveability, and aesthetic and spatial quality (see Table 6, illustrative quote a.3). It requires practical understanding of dimensional constraints, module sizes, factory production capabilities, and transportation limits (see Table 6, illustrative quote a.4).

Digital literacy and early-stage collaboration are equally essential. BIM proficiency enables clash detection and digital-to-physical integration, but software proficiency alone is insufficient without the DfMA mindset to deploy it (see Table 6, illustrative quote a.5). MMC design requires concurrent engagement with manufacturers from project inception rather than at the documentation stage, as designers cannot be expected to independently know the production constraints, system capabilities, and dimensional requirements of every potential supplier (see Table 6, illustrative quote a.6). This requires explicit cross-disciplinary coordination across engineers, architects, services consultants, and manufacturers from the earliest project stages, as decisions made in any one discipline carry significant consequences for all others (see Table 6, illustrative quote a.7).

When this early engagement does not occur—a frequent occurrence in the Australian market—coordination responsibility defaults to the manufacturer by necessity rather than design, as they become the de facto single source of truth for the project (see Table 6, illustrative quote a.8). This dynamic, discussed further in the preceding subsection, reinforces why DfMA knowledge among design professionals, including architects and engineers, is a critical prerequisite for effective MMC delivery.

Table 6 MMC design skills—Illustrative quotes

Phase	Quote ID	Skill area illustrated	Participant account
Design	a.1	MMC as an integrated workflow requiring a different way of thinking	"For me, MMC is more than just prefabrication. It's about integrating design and manufacturing logistics and also on-site assembly into one continuous workflow... it's not just a different way of building, it's just a different way of thinking".
	a.2	DfMA as the foundational design skill	"DfMA really focuses on how you actually design to make that [MMC] happen and efficient… if you don't plan and design properly, you cannot make MMC happen, and you cannot realise the benefits that everybody's always claiming".
	a.3	Process-oriented and purpose-driven design thinking	"It's really scrutinising why you're doing and making some decisions... it's about, is it serving a purpose? Are you actually costing to reality?"
	a.4	Manufacturing constraints and logistics knowledge in design	"There are a few rules that you've got to know. You've got to know what you can put on a truck. You've got to have a feeling for structural systems, what you can achieve because you're picking it up with a forklift or a crane".
	a.5	Front-loaded decision-making and digital literacy	"Traditional construction often solves problems on site. With MMC, you need to solve them upfront, sometimes months in advance. That means stronger digital literacy is important, being comfortable with BIM and clash detection and an understanding of manufacturers' processing, tolerance, sequencing and logistics. It's a shift in mindset as much as a skill".
	a.6	Early supplier engagement and concurrent design	"You need to get the supplier in the room with you to help you tune the design… you can't expect the consultant team to know the ins and outs of all their ways of doing things".

Phase	Quote ID	Skill area illustrated	Participant account
	a.7	Cross-disciplinary coordination across MMC disciplines	"When we get into that MMC space, it's so important that all those disciplines talk together more, because there are so many little micro decisions that have such a big impact on the others".
	a.8	Coordination defaulting to manufacturer	"That design and project management stuff sits within the manufacturer in a lot of cases, because they're the ones that are ultimately making this their 3D model that will start to be the single source of truth for everything".

Manufacturing phase skill requirements

Manufacturing phase skills, while well established in other industries, differ substantially from traditional construction approaches and cannot be assumed to transfer automatically from site-based trade backgrounds. Unlike traditional construction, which is organised around bespoke, project-based practices where variability is expected and absorbed through on-site problem-solving, factory environments demand millimetre-level precision, systems thinking, quality management integration, and digital technology operation in support of production processes that systematically minimise variability and optimise resource use.

Precision and lean manufacturing principles are the defining capabilities distinguishing MMC from traditional construction practice. Factory production demands a different relationship to error than traditional construction. Where site-based work permits progressive identification and correction of defects, factory production requires errors to be anticipated and designed out through production planning and quality systems before manufacturing begins. This means that once a component has moved through the line or been closed up, remediation is rarely possible without significant cost and disruption. This shift demands a qualitatively different orientation to accuracy in workers (see Table 7, illustrative quote b.1).

Alongside precision, process-oriented thinking separates effective factory workers from those who struggle to transition from site work. Where traditional construction accommodates reactive responses to immediate problems, factory production demands that workers understand their role as one step within an integrated system, oriented toward continuous improvement (see Table 7, illustrative quote b.2). Participants contrasted successful operations, where workers engaged in root cause analysis and systemic process review (see Table 7, illustrative quote b.3). Effective factory production also requires every activity to be scheduled, clearly defined, and understood within the logic of the whole production process. This includes a deep understanding of what each step demands, what it produces, and what value it contributes to the stages that follow. Participants pointed out that recruiting trades with this process orientation remains a challenge. To bridge this gap, they have begun recruiting from manufacturing sectors, where these skills are more prevalent (see Table 7, illustrative quote b.4).

Digital technology use and quality management are deeply interrelated skill areas that complement precision and process discipline. Factory workers must interpret digital fabrication files, operate automated machinery, adapt to varying degrees of automation, and understand how digital models translate into physical production at the station level (see Table 7, illustrative quote b.5). Beyond the factory floor, digital literacy extends to supply chain and procurement functions, where workers and managers must track inbound material quality, manage supplier documentation, and use digital platforms to verify that components arriving from suppliers meet the dimensional tolerances and specification requirements that production depends on. This is important as a compromised component entering the production line can generate non-conformances that cascade through every downstream station, making supplier quality management an integral rather than peripheral manufacturing skill.

Quality assurance in the MMC context shifts from the periodic and externally imposed inspection characteristic of traditional construction sites to regular and systematic verification embedded at multiple points across the production line. Successful operations embed this verification into documented processes that leave no room for discretionary decision-making on the factory floor, reducing reliance on individual judgement and enabling consistent output across the production run (see Table 7, illustrative quote b.6). In some observed factories, where automation permits, this increasingly incorporates automated error detection systems that not only identify non-conformances in real time but can also feed information back into the design and production planning process, enabling continuous refinement of both the product and the production system itself. Where automation is limited or absent, workers must understand what data needs to be captured at each station, how it should be recorded, and into which systems it should be entered for traceability and audit purposes. This shift requires all workers, not only supervisors, to internalise quality consciousness as an integral part of their role rather than as an oversight function performed by others.

It is worth noting that the viability of factory operations depends not only on the capabilities of the manufacturing workforce but on the quality of design inputs that feed the production system. When design is not optimised for manufacturing, for instance by introducing bespoke elements, or failing to stabilise specifications early, the factory cannot achieve the consistency of demand that makes production economically sustainable (see Table 7, illustrative quote b.7). This reinforces the interdependence between design phase skill requirements and manufacturing outcomes, and underscores why DfMA knowledge in the design workforce is a manufacturing productivity issue as much as a design one.

Table 7 MMC manufacturing skills—Illustrative quotes

Phase	Quote ID	Skill area illustrated	Participant account
Manufacturing	b.1	Precision and millimetre-level accuracy	“When you get people from the manufacturing background, they’re accurate [...] They work with millimetres. But in hindsight, that benefits the company, because timber on its own has a problem, it’s not perfectly straight, so you can have misalignment”.
	b.2	Process mentality and lean thinking as core manufacturing skill	“MMC and DfMA are all to do with the mentality of a process... it’s all about process thinking, lean mentality, agile mentality, knowing to plan ahead to see what is the criticality of your project and being really process driven”.
	b.3	Continuous improvement and root cause analysis vs reactive firefighting	“Going back to the start... why did it go wrong? How do we make this more efficient? contrasted with operations where workers were constantly firefighting on the floor”.
	b.4	Recruiting from outside construction for process and precision orientation	“Sometimes we’ve recruited from outside construction, from automotive or from a manufacturing background, because they have that thinking of process and precision”.
	b.5	Digital fabrication, shop drawings, and production sequencing	“We use software to create shop drawings and generate cutting lists, so every single panel component is accounted for before we even start production. We calculate the exact weight of each module for transportation, we plan the craneage, and we create the sequencing of assembly”.
	b.6	Documented process and quality assurance on the factory floor	“It’s a documented process and a QA. The guys know, internal lining, there’s only one type, grab that board. There [are] no decisions”.
	b.7	Design optimisation as a prerequisite for factory viability	“The more you optimise the front end, the more consistency of demand is what you feed to factory operations. And that is how you achieve cost”.

Assembly and installation phase skill requirements

Assembly and installation phase skills maintain some continuity with traditional site work but demand a substantially different orientation toward sequencing, coordination, logistics, and interface management. MMC assembly workers must navigate the tension between the precision of factory-manufactured components and the inherent variability of existing site conditions. This tension relies directly on upstream design and manufacturing decisions that should be well-coordinated, including timely feedback provided by on-site workers about site conditions before and during installation.

Sequencing and interface management are the distinguishing capabilities of the assembly phase. Participants described situations where traditional trades arriving at construction sites encountered completed, closed panel assemblies that could not be accessed in the way traditional site practice assumes, requiring work sequences to be entirely reconceived, and in some cases, requiring finished work to be dismantled and reinstated at considerable cost (Table 8, illustrative quote c.1). This is not an inherent feature of MMC but a symptom of inadequate upstream coordination. It is an example of the kind of breakdown that the shared coordination responsibilities described above are intended to prevent. As practitioners noted, the moment site workers approach a MMC project as they would a traditional build, the benefits MMC is designed to deliver are reduced. This represents a consequence not of system failure but of a workforce orientation that has not kept pace with the delivery method (Table 8, illustrative quote c.2). Effective assembly therefore requires reverse-engineering completed modules, planning access sequences, and coordinating trades within compressed timeframes. Importantly, this front-loaded planning logic extends to specialist trades such as electricians, who can no longer rely on reactive workflows but must engage with designs and logistics plans well in advance of installation (Table 8, illustrative quote c.3).

Physical installation and logistics constitute a further dimension of the assembly skill set that, while drawing on capabilities present in traditional construction, is applied with greater intensity and complexity in MMC contexts. Where BIM coordination is well executed, the precision demands of installation can be managed without costly rectification, but where it is absent or incomplete the consequences aggregate rapidly and expensively (Table 8, illustrative quote c.4). Mechanical, Electrical, and Plumbing engineering (MEP) integration and compliance inspection constitute a dimension of this specialist skill set. Licensed electricians and plumbers are required not only during factory production but at the installation stage to verify, complete, and sign off embedded services work. This responsibility demands familiarity with digital evidence frameworks and signals a broader shift in how compliance inspection is conceived in MMC contexts—moving from physical and trade-based sign-off toward remote and third-party certification models that remain underdeveloped in the Australian regulatory landscape (Table 8, illustrative quote c.5). Logistics further compounds this complexity, particularly in projects involving remote or constrained sites where the transport of oversized components requires detailed route planning, heavy haulage permitting, and careful sequencing of deliveries to align with installation readiness and the availability of lifting equipment on site. Decisions about grid dimensions, module or panelised systems sizes, and wet area placement, which at first appear to be purely design questions, are in practice also logistics and installation decisions, as they determine what can be transported and how it can be craned into position (, illustrative quote c.6).

Digital tool use and quality management complete the assembly skill set. Workers are increasingly guided by tablet and BIM-based installation tools, QR-coded component instructions, and assembly information embedded in the components themselves, representing a shift from tacit craft knowledge toward explicit digital instruction. Manufacturers are increasingly designing installation guidance directly into the components and associated digital tools, reducing the training burden on-site workers while maintaining the precision that MMC demands (Table 8, illustrative quote c.7). Within quality management, workers must confirm that manufactured quality has arrived intact, document transport damage, and clearly attribute defects to their origin, whether manufacturing, transport, or installation. Participants shared examples showing that even well-planned installations can encounter transport-related quality failures that only become apparent on site, underscoring the importance of systematic arrival inspection and clear defect attribution protocols as part of the assembly skill set (Table 8, illustrative quote c.8).

Table 8 MMC assembly/installation skills—Illustrative quotes

Phase	Quote ID	Skill area illustrated	Participant account
Assembly/ Installation	c.1	Sequencing and interface management	"With MMC, especially when you're building prefab, you might get sections coming in that are finished and closed... where normally the trades can get into them, and they're having to either drill into beautifully finished panels or pull them off and put them back on again. So the sequencing of how a building like that goes together is different to the sequence of normal".
	c.2	Consequences of defaulting to traditional construction logic on site	"People on site had no understanding. We did have a few issues on site with people not really understanding how to deal with it, because they started constructing it like traditional. And the moment you do that, the benefits are gone".
	c.3	Front-loaded planning for specialist trades	"It's because it is design-led, it pushes the time frame forward. So they [electrical contractors] need to be more aware of planning and looking at designs, not just turning up on site with a drum of cable".
	c.4	Precision installation and BIM coordination on site	"There's no margin for error with steel modules. Rectification is possible, but it's extremely expensive. That's where BIM coordination has been absolutely critical, not just the architectural side of things, but especially the side, the MEP integration and fire-rated encapsulations".
	c.5	MEP integration and compliance inspection as critical installation skills	"MEP is a very important skill for modular manufacture, because this part has to be done in the factory. In the past what we do is we engage a licensed plumber or electrician. They fly over to check and then fly back. But I feel that if a third party inspector could check as representative of those trades, that will make it more efficient".
	c.6	Transport and logistics constraints shaping installation	"Early decisions about grid breakup, for instance, based on what fits on a truck… that's pretty important. Early decisions about the distribution of rooms in terms of servicing them, and about what rooms can and cannot cross over modules".
	c.7	Digitising installation instructions to reduce training demands on site	"How can you digitise that process to give people tools so that they don't need as much training? Or mark on the parts so that all the instructions on what someone needs to do are actually printed on the part itself".
	c.8	Transport damage as a quality management challenge at the installation stage	"We had the crane positioning planned early, and they got dropped in, and everything moved in the way it ought to. And then, interestingly, what we found was, when they were delivered, and partly a logistics situation, all the ceilings were cracked".

3.3. MMC workforce dynamics and emerging skills and roles in MMC

The skill requirements described across the preceding subsections do not exist in isolation. They are the product of deeper structural dynamics that MMC introduces into the built environment workforce. These dynamics not only reshape what individual workers need to know but reconfigure how roles are defined, distributed, and organised across the value chain. Four interconnected dynamics are particularly significant in shaping emerging workforce needs in the Australian MMC context:

- **the temporal-coordination nexus**, which reveals that effective MMC coordination must be distributed across the full value chain rather than absorbed by manufacturers by default, generating the need for dedicated coordination roles at the design-to-manufacture and manufacture-to-installation interfaces;
- **the resequencing of decision-making effort**, which demands that design professionals incorporate manufacturing constraints, transportation limits, and assembly sequences as design parameters from project inception, requiring a substantial reconfiguration of architecture and engineering practice and education;

- **professional boundary reconfiguration**, through which traditional disciplinary silos become blurred and new hybrid occupational types emerge at the intersection of design, manufacturing, and assembly; and
- **quality assurance, compliance, and regulatory adaptation**, which requires quality to be embedded systematically throughout factory production and compliance to be reconceived around digital evidence frameworks.

These dynamics explain the skill gaps identified in the qualitative findings and account for the emergence of new occupational profiles that existing qualification frameworks have not yet recognised (Table 9). The persona profiles developed as part of this project (Appendix III) are directly informed by these dynamics, and the connections between each dynamic and the roles it generates are described in the subsections that follow.

Table 9 MMC workforce dynamics, core implications, and associated persona profiles.

Workforce dynamic	Core implication	Key skill/capability demand	Associated persona profiles
Dynamic 1: Temporal-coordination nexus	Coordination must be front-loaded and distributed across all four modes of MMC production through an interdependent information flow. The Australian market's horizontal integration means manufacturers cannot sustainably absorb the full coordination burden, and a distributed equivalent of Lessing's (2006) Process Owner is required in place of a single vertically integrated role.	Dedicated coordination capability at the design-to-manufacture and manufacture-to-installation interfaces; clearly defined information generation and sign-off responsibilities across all parties; shared language and mutual understanding of adjacent domains across the value chain.	Project Manager (Persona 10); Assembly Integrator (Persona 11).
Dynamic 2: Temporal resequencing of decision-making	Front-loaded decision-making requires design professionals to incorporate manufacturing constraints, transportation limits, and assembly sequences as key design parameters alongside established considerations of sustainability, performance, and quality. DfMA is a design approach demanding knowledge transfer between design and production across all four modes of production. This knowledge must be distributed rather than concentrated in a single role.	DfMA mindset; manufacturing and logistics literacy; design freeze discipline; supply chain engagement from project inception; hybrid practitioner knowledge bridging building design and component design.	Design Project Lead (Persona 1); Client and Developer (Persona 2); Head of Product (Persona 3).
Dynamic 3: Professional boundary reconfiguration	Traditional disciplinary silos become dysfunctional as MMC narrows tolerance margins, compresses decision timelines, and distributes coordination responsibilities across the value chain. New hybrid grey-collar roles and cross-disciplinary manufacturing specialists emerge at the intersection of design, manufacturing, and construction knowledge systems. At the operative level, multi-station capability replaces single-trade specialisation.	Hybrid skills bridging trade expertise and design or digital literacy; process discipline and repeatability; multi-skill trade capability; cross-disciplinary knowledge integrating manufacturing logic and construction knowledge.	Head of Product (Persona 3); Operator (Persona 7); Production Planner (Persona 4); Estimator (Persona 5); Supply Chain and Procurement Specialist (Persona 6).
Dynamic 4: Quality assurance, compliance, and regulatory adaptation	Quality assurance and compliance are integrated dimensions across design, manufacturing, and installation. Building regulatory knowledge, licensed trade expertise, digital evidence assessment, and factory production process understanding must be combined at the regulatory interface between manufacturing, certification, and installation, reflecting the same cross-disciplinary reconfiguration described in Dynamic 3 but with a compliance lens.	Systematic quality verification embedded at multiple points across the production line; digital evidence assessment; inspection hold point management within production programmes; non-conformance reporting; cross-phase defect attribution across manufacturing, transport, and installation; internalisation of quality consciousness at every production station.	Compliance Inspector and Technical Certifier (Persona 12); Supervisor (Persona 8); Operator (Persona 7); with upstream implications for: Head of Product (Persona 3); Assembly Integrator (Persona 11); Design Project Lead (Persona 1).

Dynamic 1: The temporal-coordination nexus and the distributed coordination imperative

As established earlier in this section (see Section 4.2), a defining characteristic of the MMC business model is that coordination must be front-loaded rather than site based. The most consequential decisions must be resolved before manufacturing commences, because the tolerance for change narrows progressively as the project moves from design through production to installation. This front-loading imperative arises directly from the nature of MMC production itself, which occurs not at a single site but across four distinct and interdependent modes: factory production, factory assembly, site production, and site assembly (Kuzmanovska, 2020). Each mode generates different constraints, tolerances, and sequencing requirements, and decisions made within one mode carry direct consequences for what is achievable in those that follow (Kuzmanovska, 2020). Effective coordination must therefore span all four modes simultaneously, anticipating how a design decision made in the office will affect factory production scheduling, how a factory assembly sequence will determine site installation logic, and how site production realities must be confirmed and communicated upstream before factory assembly can commence.

In principle, this coordination operates through an interdependent information flow distributed across the full value chain. Designers provide documentation resolved to a level suitable for fabrication translation; fabricators convert that intent into producible shop drawings, fabrication data, and installation and logistics plans; and builders confirm site realities and formally sign off the information that fabrication depends on. Each party both generates and depends on information produced by the others, and the system functions only when all parties fulfil their defined responsibilities at the right point in the project timeline.

This distributed coordination model has a well-established theoretical position in Lessing's (2006) formulation of the *Process Owner*—a dedicated role responsible for ensuring integrated coordination across the full industrialised building value chain, with knowledge spanning design, production, and assembly. In Lessing's conceptualisation, this role is most naturally realised within a vertically integrated organisational model (Lessing & Brege, 2018), where a single firm controls design, manufacturing, and assembly under one operational system, enabling one person or function to hold knowledge across all modes of production because they occur within shared organisational boundaries (Kuzmanovska, 2020). The Australian MMC market, however, is predominantly horizontally integrated; with designers, manufacturers, builders, and certifiers operating as typically separate organisations under discrete contractual arrangements, often without the shared systems, language, or incentives that vertical integration enables. In this context, concentrating the full coordination and knowledge function within a single *Process Owner* role is neither organisationally realistic nor structurally achievable for most Australian MMC projects. What the market requires instead is a distributed equivalent, not one practitioner who understands everything, but a set of boundary-spanning roles who each possess sufficient knowledge of adjacent domains to communicate effectively, generate the information their counterparts depend on, and fulfil their defined responsibilities at the right point in the project timeline. This is precisely what the persona profiles developed in this project propose. Rather than replicating Lessing's (2006) vertically integrated *Process Owner*, they map a horizontally integrated equivalent—a networked system of practitioners, from the **Design Project Lead** and **Head of Product** through to the **Project Manager**, and **Assembly Integrator**, each spanning the boundary between their domain and the next, and collectively performing the coordination function that no single role can fulfil alone in the still-maturing Australian MMC market. The development of shared language, mutual understanding of adjacent domains, and clearly defined information responsibilities across these personas is the precondition for effective MMC coordination in the Australian context.

In practice, however, this distributed coordination model breaks down. Observations across the national fieldwork revealed that the contractual arrangements, professional norms, and knowledge distributions characterising the current Australian MMC market are not yet configured to sustain the interdependent information flow that effective MMC coordination requires. The relative immaturity of the market means that many companies continue to approach MMC projects through traditional contractual arrangements that were not designed for front-loaded and integrated delivery.

Designers deliver documentation without adequate manufacturing resolution, builders disengage from early decision-making, and manufacturers absorb the full coordination burden by default rather than by design—concentrating in one party a responsibility that the system requires all parties to share.

This coordination failure has a direct workforce implication. It reveals the absence of roles whose explicit purpose is to own and manage the two handover points where MMC delivery is most vulnerable to failure: the transition from design to manufacture, where documentation must be complete and formally approved before production begins, and the transition from manufacture to installation, where factory-produced components must be integrated with site conditions in a sequence determined upstream. Failures at either interface carry immediate and disproportionate consequences for cost, schedule, and quality. The emergence of dedicated coordination roles on both the manufacturing and assembly sides of the value chain is a direct organisational response to this structural dynamic. On the manufacturing side, the **Project Manager** has emerged as the manufacturer's delivery lead. The defining functions of this role—holding the factory programme against the site programme, enforcing design freeze, and managing the client and contractor interface from within the supply chain—are specific to the MMC delivery model. On the assembly and installation side, the **Assembly Integrator** has emerged as a distinct on-site role responsible for managing the interface between factory-manufactured systems and products and site-based works. In traditional construction, this interface is absorbed informally by site supervisors; in MMC it requires dedicated expertise in coordination, logistics, precision installation, and connection systems, supported by digital evidence management capabilities. Where BIM capability is more developed on the builder's side, this role may overlap with or be fulfilled by a BIM coordinator, reflecting the extent to which digital coordination has become central to effective installation management. Both roles signal that coordination in MMC is an emerging specialist function that the current Australian workforce is only beginning to recognise and develop.

Dynamic 2: Temporal resequencing of decision-making and the upskilling of the design workforce

The shift from end-loaded to front-loaded decision-making in an MMC context restructures not only when decisions are made but who must be capable of making them. MMC demands that architects, engineers, and design consultants consider and resolve manufacturing constraints, transportation limits, assembly sequences, and logistical dependencies at the early stages of the project lifecycle. This ultimately requires capabilities that traditional architecture, engineering and construction education does not systematically cultivate (Ginigaddara et al., 2022; Assaad et al., 2022). As the qualitative findings demonstrate, this creates a persistent gap between what professionals are trained to do and what MMC delivery requires of them.

Understanding why this gap exists requires situating it within how design itself is conceptualised in MMC. DfMA, as a design approach within the broader context of industrialised construction, is concerned with the transfer of knowledge between design and production, not simply with the adoption of prefabrication as a delivery mechanism (Kuzmanovska, 2020). This distinction matters because industry discourse has at times conflated DfMA with prefabrication, obscuring the deeper design capability shift that MMC demands. As described in Dynamic 1, building production in MMC occurs across four distinct and interdependent modes (i.e., factory production, factory assembly, site production, and site assembly) and design decisions carry consequences across all four (Kuzmanovska, 2020). In order to maximise the benefits of these modes of production, some design activities are necessarily released from the architectural designer and passed further up the supply chain, engaging the component designer and, increasingly, a third frame of reference: the hybrid practitioner who holds deep knowledge of both design intent and production realities simultaneously. As product platforms and kits-of-parts become more common in the MMC context, this hybrid frame of reference becomes a necessity, reflected in the emergence of a practitioner who understands how all four modes of production come together to deliver not only efficiency but broader design value across the value chain (Maxwell & Aitchison, 2017). Nevertheless, as explained in Dynamic 1, the Australian market's horizontal integration means this hybrid knowledge cannot be concentrated in a single role but must be distributed across a networked system of boundary-spanning practitioners, each holding sufficient knowledge of adjacent domains to fulfil their part of the distributed coordination function.

This hybrid frame of reference is precisely what the **Head of Product** embodies in practice. Positioned at the intersection of design literacy and manufacturing knowledge, this grey-collar role represents the institutionalisation of the third frame of reference within MMC manufacturing organisations. The **Head of Product** is the practitioner who understands how factory production, factory assembly, site production, and site assembly interact, and who translates that understanding into producible shop drawings, fabrication data, and installation sequences. The emergence of this role in Australian MMC practice is not coincidental but a direct organisational response to the knowledge gap that temporal resequencing exposes when neither the building designer nor the component designer alone possesses the cross-boundary fluency that integrated MMC delivery demands.

This expanded conception of design responsibility has direct workforce implications beyond the factory floor. Traditional design education trains professionals to optimise across a well-established set of considerations, including spatial quality, aesthetic resolution, structural performance, environmental sustainability, occupant comfort and liveability, and regulatory compliance. These considerations remain valid and significant in an MMC context. What MMC adds, however, is a further and non-negotiable layer: how the design of the building and its components responds to production methods in order to facilitate easy, fast, efficient, and mistake-proof production (Kuzmanovska, 2020, p. 496). This includes how a building element will be manufactured, at what dimensional tolerance, within what module size, subject to what transportation constraints, and in what assembly sequence. When these constraints are not understood at the point of design, the downstream consequences, including redesign, production delays, cost overruns, and coordination failures, are disproportionate to the decisions that caused them.

This dynamic directly informs three persona profiles. The **Design Project Lead** represents the upskilled architect or lead designer who has extended their practice to incorporate DfMA principles, manufacturing constraints, and early-stage cross-disciplinary coordination, capabilities that complement rather than replace core design expertise. The **Design Project Lead** illustrates how temporal resequencing does not create an entirely new role but reconfigures an existing one, demanding that design professionals extend their knowledge boundaries into the supply chain in ways that traditional education does not prepare them for. This extension does not require architects to become manufacturing engineers, it requires them to understand manufacturing logic sufficiently to make design decisions that do not generate production later in the project lifecycle, and to engage with suppliers and component designers from project inception rather than at the documentation stage. The **Client and Developer** persona reflects a related but distinct implication of the same dynamic. **Clients and developers** who commission MMC projects must understand design freeze requirements, non-negotiable programme milestones, and the cost consequences of late variations, because their decisions, or indecision, at the design stage directly determine whether the manufacturing programme can be sustained. This persona captures the often-overlooked reality that temporal resequencing places demands not only on technical professionals but on the client side of the delivery chain, where the instinct to keep design options open collides directly with the production logic that MMC demands. Finally, the **Head of Product**, while discussed above in the context of the hybrid practitioner framework, is equally a product of this dynamic. The role emerges at the boundary between design and production precisely because the temporal resequencing of decision-making creates a knowledge gap that neither the building designer nor the component designer alone can fill, and that no single vertically integrated role can resolve in the horizontally structured Australian MMC market.

Dynamic 3: Professional boundary reconfiguration and the emergence of hybrid roles

The temporal resequencing and coordination demands described in Dynamics 1 and 2 also destabilise the professional and occupational boundaries that traditional construction practice has maintained between design, manufacturing, and assembly. As MMC narrows tolerance margins, compresses decision timelines, and distributes coordination responsibilities across a horizontally integrated value chain, traditional disciplinary silos become not only blurred but dysfunctional. This boundary reconfiguration generates new occupational types that sit at the intersection of domains that training and qualification frameworks have historically kept separate, and it reshapes how blue-collar work is organised at the operative level.

The grey-collar profile, introduced in Dynamic 2, represents the most significant of these emerging and hybrid occupational types. As mentioned above, the Australian market requires that the knowledge of all four modes of production be distributed across a networked system of boundary-spanning practitioners rather than concentrated in a single role. The **Head of Product**, already discussed as the institutionalisation of this hybrid frame of reference within manufacturing organisations, is the clearest example of this profile. However, the professional boundary reconfiguration dynamic extends well beyond this single role. It operates across the full manufacturing workforce, reshaping how operative-level work is organised, how specialist functions are defined, and how knowledge is distributed between roles that traditional construction kept separated and fragmented.

At the operative level, the **Operator** captures a parallel but distinct expression of boundary reconfiguration. Where the **Head of Product** bridges design and manufacturing at the professional level, the **Operator** bridges multiple trade scopes at the production floor level. Rather than specialising in a single trade (e.g., carpentry, cladding, or services rough-in), the **MMC Operator** rotates across multiple factory stations, following documented standard operating procedures and quality checkpoints. This shift from single-trade specialisation to multi-station capability is a reorganisation of how blue-collar work is conceived in factory environments, where the logic of process discipline and repeatability governs what workers do and how their contribution is defined. The **Operator** represents a new occupational type that existing trade qualifications and apprenticeship frameworks were not designed to produce.

Professional boundary reconfiguration also drives the emergence of specialist functions within the manufacturing phase that draw simultaneously from manufacturing logic and construction knowledge. This cross-disciplinary character makes them difficult to produce through qualification frameworks anchored exclusively to either sector. In traditional construction, the functions these roles perform were absorbed by generalist project managers or quantity surveyors operating within construction-specific knowledge systems. In MMC, the demands of factory-based production have differentiated these functions to a degree that neither construction nor manufacturing training alone can address. The **Production Planner** requires Takt-time calculation, materials requirements planning, and factory flow optimisation from manufacturing, alongside an understanding of construction sequencing, site programme dependencies, and the delivery constraints that govern when manufactured elements must arrive on site. The **Estimator** requires component-level costing and station-level productivity modelling from manufacturing, alongside building regulatory knowledge, construction procurement understanding, and familiarity with the cost structures of both factory production and site-based works. The **Supply Chain and Procurement Specialist** reflects just-in-time delivery management and supplier tolerance compliance from manufacturing, alongside construction product knowledge, building lead time awareness, and site delivery logistics that conventional manufacturing procurement does not need to consider. Each of these profiles sits at the intersection of two knowledge systems that traditional qualification frameworks have maintained as separate. Their emergence is not simply evidence of new roles appearing within an existing occupational landscape but of a cross-disciplinary reconfiguration of the manufacturing workforce that existing VET and higher education frameworks are unprepared to support.

The persona profiles generated by this dynamic form a coherent pattern. Professional boundary reconfiguration in MMC reorganises the entire occupational landscape of the manufacturing phase, distributing knowledge and responsibility across a set of specialised, boundary-spanning roles whose collective capability constitutes the workforce system that effective MMC factory operations require. This reorganisation is the manufacturing-phase counterpart of the distributed coordination system described in Dynamic 1 and the design capability reconfiguration described in Dynamic 2.

Dynamic 4: Quality assurance, compliance, and regulatory adaptation

National industry consultation and observational fieldwork consistently confirm that compliance in MMC cannot follow the inspection logic of conventional building delivery. When panels are enclosed in the factory before they are transported to site, the electrical rough-in, hydraulic pipework, insulation, and structural connections embedded within them become permanently inaccessible after the point of closure. Compliance must therefore occur before the element leaves the factory, at a point in the production process where standard building inspection regimes were not originally designed to operate. This requires a reconception of what constitutes adequate evidence of compliance, who bears responsibility for generating and verifying that evidence, and how the regulatory chain of custody is maintained across a production process that spans factory, transport, and site. Digital evidence frameworks must substitute for physical inspection in ways that are legally defensible, practically achievable within production rhythms, and sufficiently rigorous to satisfy the independent certifier.

This regulatory displacement cannot be resolved through compliance mechanisms alone. It requires a parallel shift in how quality assurance is conceived and practised across the full value chain. In this sense, quality assurance and compliance in MMC are integrated into a single discipline that spans design, manufacturing, and installation simultaneously. Quality parameters are established at the design stage, where decisions about tolerances, services integration, and assembly sequences determine what the factory must achieve and what the certifier must verify. They are maintained throughout factory production, where systematic verification at multiple points across the production line generates the record that compliance depends on. These parameters are also confirmed at installation, where workers must verify that manufactured quality has arrived intact, attribute defects to their origin across manufacturing, transport, and installation, and assemble the digital handover package that the certifier requires before sign-off. This cross-phase and cross-disciplinary character of quality assurance is what makes it inseparable from compliance in MMC, and what distinguishes it from the periodic and externally imposed inspection model of conventional building delivery.

The cross-disciplinary character of this dynamic extends to the roles it generates and reconfigures, connecting directly to the boundary reconfiguration argument established in Dynamic 3. Just as Dynamic 3 describes how manufacturing and construction knowledge systems are being forced into a combination within the manufacturing phase, Dynamic 4 describes how building regulatory knowledge, licensed trade expertise, digital evidence assessment capability, and factory production process understanding are being forced into combination at the regulatory interface between manufacturing, certification, and installation. The **Compliance Inspector and Technical Certifier** is the most significant expression of this cross-disciplinary reconfiguration. It is a reconceived professional function that simultaneously requires familiarity with digital evidence frameworks, factory production processes, inspection sequencing within manufacturing programmes, and the legal standing of off-site sign-off under state building legislation. The role is fulfilled by different licence holders depending on scope, including building certifiers for structural and envelope compliance, licensed electricians for electrical rough-in, and licensed plumbers for hydraulic and drainage, but all share the common challenge of developing and applying evidence standards aligned with MMC systems. This persona can only be met by practitioners who are willing and able to extend across the boundary between regulatory compliance, production knowledge, and digital evidence management.

On the factory floor, the quality assurance dimension of this dynamic generates its own cross-disciplinary reconfiguration. The **Supervisor** occupies a role that sits at the intersection of manufacturing quality systems and building regulatory compliance, requiring both the process discipline and continuous improvement orientation of factory production management and the documentation rigour and inspection protocols of building certification. This cross-disciplinary character distinguishes the MMC Supervisor from both a traditional construction site supervisor and a conventional manufacturing quality controller, because the role must understand what constitutes adequate evidence for the certifier while maintaining production rhythm on the factory floor. The **Operator**, already discussed in Dynamic 3 as the operative-level expression of boundary reconfiguration, carries a further quality dimension in this context. The **Operator** should embrace the internalisation of quality consciousness as a personal responsibility at every station, understanding that a deviation from standard operating procedures is not an exercise of initiative but a potential non-conformance with downstream regulatory consequences. At the installation stage, the **Assembly Integrator** must be capable of distinguishing between defects attributable to manufacturing, transport, and installation, a distinction that has direct compliance implications when the certifier's evidence package is assembled, and that requires familiarity with factory production standards, transport damage patterns, and installation tolerances.

This dynamic also has upstream implications that reach back into design. Designers must resolve which services are manufactured off-site and embedded in panels, and therefore subject to factory inspection, and which are installed on site under conventional inspection regimes. Early resolution of this question is a quality and compliance one: late changes to the services scope after production has commenced can invalidate inspection hold points and require destructive opening of completed panels to satisfy certifier requirements. In this sense, quality assurance and compliance begin at the design stage, reinforcing the front-loaded decision-making argument established in Dynamic 2 and the cross-phase information flow argument established in Dynamic 1.

3.4. Key findings from MMC adoption and workforce capability in the Australian context

The findings presented in this section reveal a sector that is young despite its historical roots. Australia's engagement with MMC as a response to housing supply pressures dates to the mid-twentieth century, yet the market remains characterised by small firms, uneven capability distribution, and a persistent gap between recognised training needs and actual investment. The most significant empirical finding is a paradox regarding workforce capability. Labour shortages have motivate companies to adopt MMC, while skills gaps prevent them from doing so successfully, creating a constraint that market forces alone are unlikely to resolve. This is compounded by a training investment gap, with only 58% of companies investing in any MMC-related capability development and 70% of those relying on self-developed content. This finding signals the absence of accessible, standardised, and externally delivered training provision capable of meeting sector-wide need, as consistent with findings from the market review (Section 3.1).

The qualitative findings reveal that capability gaps in the Australian MMC market are not evenly distributed. Manufacturers hold a comparatively stronger knowledge base than designers and builders, yet manufacturer capability is itself uneven, ranging from manufacturer who apply process-oriented and platform-based production discipline to those who replicate traditional construction logic in a factory setting. This internal variation within the manufacturing sector distinguishes the Australian context from more mature MMC markets, such as those ones analysed in the cross-country comparison, see Section 3.2, and shapes the specific skill requirements and coordination failures that the qualitative findings document, including MMC skills framework and persona profiles reflect.

Coordination dynamics along the Australian MMC value chain, reflected in reconfigured and emerging roles and occupations (Appendix III), are consequences of a market that is predominantly horizontally integrated, where designers, manufacturers, and builders, operate as separate organisations without the vertical integration seen in the other international markets (Lessing & Brege, 2018). In the absence of a single vertically integrated actor capable of holding knowledge across all four modes of MMC production, the findings point toward the need for a networked system of boundary-spanning practitioners who collectively perform the coordination function that no single role can fulfil alone. The persona profiles developed in this project represent precisely this distributed model, mapping the roles, knowledge boundaries, and information responsibilities that the Australian MMC market requires but that existing qualification frameworks have not yet produced.

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The four workforce dynamics identified: the temporal-coordination nexus, temporal resequencing of decision-making, professional boundary reconfiguration, and quality assurance and compliance adaptation, explain the skill demanded within MMC contexts and the emergence of new occupational types, including grey-collar hybrid roles, cross-disciplinary manufacturing specialists, and multi-skilled operators, that sit at the intersection of domains traditional training systems have historically kept separate. The analysis of the readiness of the Australian VET and higher education system presented Section 5 are grounded in these challenges, addressing not isolated skill deficits within existing roles but the systemic reconfiguration of role boundaries, qualification structures, and coordination responsibilities that MMC adoption demands of the Australian built environment workforce.

4. READINESS OF THE AUSTRALIAN VET AND HIGHER EDUCATION SYSTEM FOR MMC

The preceding sections have established foundations for the analysis that follows. Section 3 provided an international perspective, mapping MMC workforce development approaches and training program offerings across selected MMC-mature markets to identify transferable lessons for the Australian context. Section 4 examined the domestic reality, documenting the skill requirements, workforce dynamics, and emerging occupational profiles that MMC adoption is generating across the Australian built environment value chain. These sections reveal a consistent and urgent finding, the capabilities that the Australian MMC industry needs are not being produced systematically by the VET and HE systems, or the interface between them.

Section 5 turns directly to this question, examining whether Australia's VET and HE systems are configured to deliver the skills, qualifications, and occupational pathways that the MMC workforce requires. The question of whether Australian education and training systems are fit for purpose in an evolving economy is not unique to the MMC sector. Now, this examination is a live and active policy discourse at the national level. Significant reviews and reform processes are already underway that bear directly on the issues this section addresses, including emerging work on skills taxonomies and national qualification frameworks, reviews of VET qualification design and transferability, and sector-specific workforce readiness assessments relevant to the built environment sector. These reform processes signal that the structural tensions between industry capability needs and educational system design are already recognised across government, industry, and regulatory bodies. Importantly, the MMC sector's workforce development challenges sit within, rather than apart from, a broader national conversation about the future of vocational and professional education in Australia.

Against this backdrop, Section 5 examines the current state of MMC-relevant provision across both VET and HE, identifies the misalignments between existing qualification frameworks and the cross-disciplinary, boundary-spanning roles that MMC demands, and develops evidence-based recommendations for the reforms required to close the gap. The analysis is informed throughout by the skill requirements, workforce dynamics, and persona profiles established in Section 4, treating these not as rigid competency lists but as dynamic workforce development targets against which the readiness of the education system must be assessed.

4.1. The Australian policy discourse on education and training reform

Across government, industry, and regulatory bodies, a convergent and active reform discourse is already underway that speaks directly to the misalignments this project's findings document. Three intersecting reform agendas are particularly relevant to the MMC workforce development challenge and provide important context for the analysis that follows:

- **the reform of Australia's VET qualification system**: initiated through the Qualification Reform Design Group's advice to Skills Ministers proposing a shift toward a purpose-driven qualifications system (Qualification Reform Design Group, 2024) and subsequently formalised through the Training Package Organising Framework, which took effect from 1 July 2025 and now governs how all new and updated training package qualifications are designed, including specific provisions for cross-sectoral skills and workforce transitions (Skills and Workforce Ministerial Council, 2025);
- **the harmonisation of VET and HE into a more cohesive tertiary system**, advanced through Jobs and Skills Australia's work on tertiary harmonisation and the development of a

National Skills Taxonomy to support a common language across both sectors (Jobs and Skills Australia, 2025b); and

- **the assessment of the built environment sector's specific VET readiness** for emerging workforce demands, documented in BuildSkills Australia's VET Future Readiness Review (BuildSkills Australia, 2025b).

The first reform agenda shifts Australia's VET qualification system away from a one-size-fits-all, occupation-specific model toward a purpose-driven approach that acknowledges the different functions qualifications serve across the labour market. The current system, built on competency-based Training Packages introduced in 1997, has produced a proliferation of narrow and underutilised qualifications poorly matched to the pace of industry change (Qualification Reform Design Group, 2024). By 2024, the VET system had expanded to approximately 1,200 qualifications and 15,000 units of competency, yet more than 21% of qualifications had no enrolments and over 32% had fewer than ten enrolments per year (Qualification Reform Design Group, 2024). In March 2024, the Qualification Reform Design Group presented advice to Skills Ministers proposing a shift away from this one-size-fits-all approach toward a purpose-driven and differentiated system guided by design principles and informed by data and evidence. The reform model, now embedded in the Training Package Organising Framework (Skills and Workforce Ministerial Council, 2025), introduces three qualification purposes that enable a more differentiated and responsive system (Table 10). The framework further requires that all qualifications support the transferability of skills, transitions across occupations and industries, and mobility across the labour market, design requirements that align directly with the boundary-spanning and cross-disciplinary workforce profiles that MMC demands.

Table 10 VET qualification purposes under the Training Package Organising Framework (Skills and Workforce Ministerial Council, 2025).

Purpose	Description	Relevance to MMC workforce development
Purpose 1 Occupation-specific qualifications	Qualifications designed for a specific occupation, maintaining the level of specificity required for licensed trades and safety-critical roles. Unlikely to change substantially under the reform.	Relevant to licensed trades required in MMC contexts, including electricians, plumbers, and building certifiers whose sign-off functions are essential to compliance in off-site manufacturing.
Purpose 2 Multi-occupation qualifications	Qualifications that prepare learners for multiple related occupations within an industry, considering skill similarity, transferability, and reduction of unnecessary duplication.	Relevant to multi-skilled operators and grey-collar roles such as the Head of Product, whose skill requirements span multiple occupational categories within the construction and manufacturing interface.
Purpose 3 Cross-sectoral and pathway qualifications	Qualifications that develop cross-sectoral or foundational skills and knowledge applicable across industries, or that lead to tertiary education and training pathways. Stronger emphasis on reducing specification and supporting applied learning.	Most directly relevant to MMC as it provides a qualification mechanism for workers transitioning from manufacturing into construction, and for design and engineering professionals seeking to formalise manufacturing knowledge through VET pathways that currently do not exist.

The second reform agenda concerns the broader harmonisation of VET and HE into a more cohesive tertiary system. Jobs and Skills Australia's work on tertiary harmonisation has identified the persistent separation between VET and HE as a constraint on workforce mobility, career progression, and the development of hybrid capabilities (Jobs and Skills Australia, 2025b). The harmonisation roadmap highlights that pathways between VET and HE remain underdeveloped in both directions. While VET-to-HE movement is increasing, stakeholders describe the system as difficult to navigate, with credit transfer arrangements that are inconsistent and poorly understood. This finding is also directly relevant for the grey-collar workforce development challenge, where design graduates need to acquire manufacturing and fabrication knowledge that the VET system holds but higher education does not access, or carpenter trades need DfMA knowledge that HE holds. Jobs and Skills Australia has also developed a National Skills Taxonomy (Jobs and Skills

Australia, 2025a) aimed at creating a shared definitional framework for skills across both sectors, supporting interoperability, consistent recognition, and the development of transferable credentials that workers can carry across employers and jurisdictions.

The third agenda concerns whether the built environment sector's VET provision is adequately configured to meet the workforce demands that technological transformation, including the adoption of MMC, is generating across construction, property, and water industries. BuildSkills Australia's VET Future Readiness Review (2025b) draws on extensive engagement with employers, employees, unions, and training providers to assess the current state of the nationally recognised training system against these demands. Its central finding is that the training system, while robust in foundational occupational skills, is not keeping pace with the real-world demands of a sector undergoing rapid technological change. The review identifies four interconnected system-wide challenges: qualification development cycles too slow to reflect the pace of industry transformation; transferable and enabling skills insufficiently embedded in current training products despite being identified by industry as core requirements; informal training playing a growing but unrecognised role in filling gaps left by the formal system; and supply-side constraints limiting the capacity of RTOs to deliver relevant and up-to-date training at the scale the sector requires. Directly relevant to this project, BuildSkills Australia has committed to assessing the jobs and skills implications of MMC as a priority action, ensuring training products evolve to reflect how MMC is changing skill requirements across the built environment.

These three reform agendas are convergent in their findings and, to a significant extent, in their proposed directions. All three point toward the need for:

- more agile, modular, and responsive qualification systems capable of keeping pace with the rate of industry transformation;
- greater integration between VET and HE to cultivate the hybrid capabilities that emerging roles such as grey-collar workers require;
- a skills-first approach that treats skills as transferable and dynamic rather than fixed to single occupations or sectors; and
- improved mechanisms for recognising and credentialling capabilities acquired outside formal qualification frameworks, including through informal training, cross-sectoral experience, and workplace learning.

They also confirm that the tensions between industry capability needs and educational system design are already recognised across government, industry, and regulatory bodies, and that the MMC sector's workforce development challenges sit within, rather than apart from, a broader national conversation about the future of vocational and professional education in Australia. The analysis that follows examines how well the current system is positioned to meet those challenges and what reforms are required to close the gap.

4.2. Readiness of the Australian education and training system

The reform agendas described in the preceding subsection provide an important and timely policy backdrop, but they do not resolve the central challenge this project's findings document. The national industry survey, industry consultation, observational fieldwork, and the broader qualitative analysis presented in Section 4 suggests that the Australian VET and higher education systems, and the interface between them, are not currently configured to produce the workforce that MMC adoption requires. Three interconnected findings explain why.

Finding 1: Curriculum and content misalignment across VET and higher education

Neither the VET system nor higher education currently embeds the knowledge and skill requirements that MMC demands across design, manufacturing, and assembly, and where embedding has begun it remains at an early and fragmented stage. In VET, trade qualifications are anchored to on-site construction contexts, creating a regulatory misalignment where factory-based production roles lack formal recognition and workers operating manufacturing equipment may possess practical competence while lacking credentials that regulatory frameworks require. Conversely, workers holding traditional trade qualifications often lack the process-oriented and precision-focused capabilities that factory environments demand. Some early steps toward embedding MMC-relevant content are emerging, for instance, through the Future of Housing Construction Centre of Excellence at Melbourne Polytechnic represents a promising initiative in this direction. However, the provision remains uncoordinated across TAFEs, RTOs, and higher education institutions, with no systemic mechanism to ensure consistent delivery, shared standards, or transferable outcomes across providers and jurisdictions.

In higher education, architectural and engineering programs continue to privilege aesthetic resolution, structural performance, and theoretical design knowledge while largely omitting manufacturing principles, DfMA, logistics, and assembly sequencing as curriculum priorities. Importantly, this gap extends beyond manufacturing knowledge to involve the applied and job-ready construction knowledge that graduates need to practise effectively. This knowledge involves an understanding of how buildings are actually assembled, what happens on a construction site, and how design decisions translate into physical reality. MMC amplifies this deficit because it demands that architects and engineers understand not only construction logic but manufacturing logic simultaneously, requiring educational programs to bridge two domains that accreditation frameworks have historically treated as separate. Construction sits at the intersection of VET and higher education in ways that most other industries do not. It produces both trade-qualified workers through VET and professionally accredited practitioners through higher education, yet the accreditation regimes governing each sector operate in isolation, with separate standards bodies, separate curriculum requirements, and no shared framework for developing the cross-domain capabilities that MMC practice requires. The result is a persistent mismatch between what graduates of both systems know and what MMC employers need them to know. This mismatch is currently being absorbed by industry through in-house training programs developed at considerable cost and with limited transferability across employers and MMC systems. This self-developed content pattern places the greatest burden on the small firms that dominate the Australian MMC sector and that have the least capacity to sustain it.

Finding 2: Structural pathways gaps prevent the development of grey-collar and cross-disciplinary roles

The hybrid capabilities that MMC demands, particularly the grey-collar profiles and the hybrid manufacturing-construction profiles identified in Section 4, are not produced by any existing qualification pathway in the Australian system. The institutional separation between VET and higher education means that the cross-boundary knowledge these roles require is split across two systems that do not communicate effectively with each other. Workers seeking to move from trade backgrounds into design-adjacent roles, or from design and engineering backgrounds into manufacturing knowledge, face a system in which credit transfer is inconsistent, articulation arrangements are limited, and the pathway from higher education into VET is neither well understood nor structurally supported. This uneven pathway landscape is particularly consequential for MMC, and the problem is not only that pathways are absent but that the system lacks the flexibility to deliver targeted and modular access to knowledge that already exists within it. A design graduate who needs manufacturing process understanding and precision knowledge does not need to qualify as a tradesperson, and a tradesperson who needs design literacy and digital coordination capability does not need a full engineering degree. Yet the current framework offers no mechanism for either worker to access the specific cross-boundary knowledge they need without undertaking full qualifications anchored to occupations they are not seeking to enter, making the system both overrequiring and underdelivering for the hybrid workforce MMC demands.

This gap is especially significant for the grey-collar and cross-disciplinary roles that MMC generates. Personas such as the Head of Product, the Production Planner, and the Assembly Integrator sit precisely at the intersection of VET and higher education knowledge systems that the current framework cannot bridge, requiring capabilities that are neither wholly vocational nor wholly professional but genuinely hybrid in character. The absence of formal qualification pathways for these roles means that the knowledge and experience workers develop in practice remains largely invisible to the system, unrecognised, non-portable, and unable to contribute to a worker's formal qualification profile.

The decline of Australia's manufacturing sector compounds this gap considerably. Unlike Germany and Sweden, where manufacturing and construction knowledge systems have developed in proximity and workers move between the two sectors with relative ease, Australia lacks a ready pipeline of workers with factory-based production experience who could transition into MMC contexts with formal recognition of their existing expertise. The closure of automotive manufacturing facilities, once important centres of lean manufacturing expertise and process discipline, has weakened the national knowledge base in precisely the capabilities that MMC factory environments demand. In the absence of domestic supply, the national fieldwork observations confirm that manufacturers are drawing on practitioners who have relocated from MMC-mature markets overseas to fill roles requiring manufacturing knowledge and process orientation.

Findings 3: System responsiveness is insufficient to keep pace with MMC's evolving skill demands

Even where curriculum content and pathway structures could be improved, the pace at which the Australian VET and higher education systems can respond to emerging industry needs is mismatched with the rate at which MMC is evolving. Qualification development and accreditation cycles that extend to multiple years render content potentially obsolete before delivery commences. In the absence of accessible and relevant formal training, MMC companies have responded by developing in-house training programs and proprietary certifications that operate outside formal qualification frameworks. While these demonstrate industry adaptability, they fragment the training landscape, limit workforce mobility across employers and MMC systems, and transfer the burden of capability development from the education system to individual workers and employing organisations.

Addressing this responsiveness deficit requires more than accelerating accreditation timelines. It requires a structural shift in how training and education is designed, delivered, and validated. Two directions are particularly relevant to the MMC context. The first concerns industry co-design. Qualifications and training products that are developed in collaboration with MMC-engaged companies, manufacturers, and professional bodies, rather than in response to them, are more likely to reflect the actual knowledge, skill, and mindset requirements of the workplace. Co-design arrangements that embed industry expertise into curriculum development, enable rapid updating of content without full reaccreditation, and create shared standards for what constitutes MMC-relevant capability across different employers and systems would address both the pace mismatch and the relevance deficit. The BuildSkills Australia VET Future Readiness Review's commitment to assessing the jobs and skills implications of MMC, and the Training Package Organising Framework's provisions for more responsive and flexible qualification design, provide the policy foundations for this shift, but their realisation depends on sustained and structured industry engagement rather than periodic consultation.

The second direction concerns the formalisation of work-based learning. Australia's current apprenticeship system provides a strong foundation for integrating workplace and formal learning, but it has not been adapted to accommodate the cross-disciplinary and hybrid learning pathways that MMC demands. Germany's dual system, in which structured workplace training and formal education are delivered in parallel and carry equal institutional weight, offers a relevant international reference point. In the MMC context, a more formalised approach to work-based learning could enable tradespeople to develop design literacy through structured factory-based learning alongside formal VET or HE study, and design graduates to acquire manufacturing knowledge through embedded industry placements that carry formal recognition. Higher-level apprenticeships, already flagged in Jobs and Skills Australia's tertiary harmonisation roadmap as a mechanism worth exploring, represent one pathway toward this integration. What distinguishes the dual-system model from conventional apprenticeships, however, is not simply the combination of work and study but the equal institutional standing accorded to both modes of learning. In Germany's dual system, the knowledge and skills acquired in the factory or workplace carry the same formal weight as those acquired in the classroom. In this sense, employers are recognised as co-deliverers of education rather than work experience hosts, and the resulting qualification is accepted by both industry and further education institutions as fully credentialled.

4.3. Key findings from readiness of the Australian VET and higher education system for MMC

Section 5 has examined the readiness of Australia's VET and higher education systems to deliver the workforce that MMC adoption requires, situating this examination within an active and convergent national policy reform discourse. Three intersecting reform agendas—the reform of Australia's VET qualification system through the Qualification Reform Design Group's advice and the Training Package Organising Framework, the harmonisation of VET and higher education advanced by Jobs and Skills Australia, and BuildSkills Australia's assessment of the built environment sector's VET readiness—collectively signal that the structural tensions between industry capability needs and educational system design are already recognised at the national level. The purpose-driven qualification model introduced through the Training Package Organising Framework, particularly Purpose 2 and Purpose 3 qualifications, offers the most promising existing policy mechanism for addressing the cross-sectoral and hybrid capability needs that MMC generates.

Against this policy backdrop, three interconnected findings reveal why the current system remains insufficient. First, curriculum and content misalignment persists across both VET and higher education, with training and education anchored to on-site construction contexts and traditional professional knowledge that does not reflect the manufacturing principles, DfMA knowledge, and applied construction understanding that MMC demands. The Future of Housing Construction Centre of Excellence at Melbourne Polytechnic represents an important and well-resourced step toward closing the MMC training gap, bringing together industry, TAFE, and research partners around a shared national platform for workforce development in MMC. As the Centre continues to develop its programs and extend its reach across the national TAFE network, it has the potential to become a meaningful integrating mechanism for the currently fragmented MMC training landscape. Second, structural pathway gaps prevent the development of the grey-collar and cross-disciplinary roles that MMC generates, because the institutional separation between VET and higher education splits the knowledge these roles require across two systems that do not communicate effectively, and because the system requires workers to undertake full occupational qualifications when what they need is targeted and modular access to specific cross-boundary knowledge. Third, system responsiveness remains insufficient, with qualification development cycles too slow to keep pace with MMC's evolution, informal training filling gaps without formal recognition, and the absence of formalised work-based learning arrangements. Germany's dual system, in which workplace and formal learning carry equal institutional weight, offers a relevant international reference point for the structural shift that Australian MMC workforce development requires.

5. CONCLUSIONS AND RECOMMENDATIONS

This research set out to investigate the workforce implications and skill needs essential for widespread adoption of MMC in the Australian built environment sector, and to develop evidence-based recommendations to guide workforce development, training provision, and education reform. This section concludes with key conclusions that have informed recommendations for policy, practice, and research:

5.1. Conclusions

Across three stages of research—international benchmarking, national industry investigation, and education system assessment—the findings converge on a consistent conclusion: the workforce dimension of MMC adoption is not a secondary concern to be addressed once technological, regulatory, and financial conditions are in place. It is a primary and transversal constraint that shapes what is achievable across the entire value chain. Architects, engineers, manufacturers, tradespeople, builders, and certifiers all face workforce capability gaps that are interconnected, and progress in any one group without corresponding development across the others will not produce the integrated delivery system that MMC demands. The workforce system that MMC requires does not yet exist at the scale or in the form that widespread adoption demands, and the education and training systems responsible for producing it are not currently configured to close that gap.

The workforce challenge is structural, not incidental

The workforce challenge facing the Australian MMC sector is not a temporary skills shortage that will resolve as the market matures and more workers gain exposure to MMC practice. It is a structural misalignment between a workforce development system built for traditional, site-based, bespoke construction and an industry that requires a different logic of work. MMC is grounded in standardised systems, platform-based production, front-loaded decision-making, and integrated process thinking across design, manufacturing, and assembly (Lessing, 2006; Onyia, 2025). This structural character is confirmed across all three stages of the research. The international benchmarking reveals that countries with strong MMC adoption rates have invested systematically in workforce development infrastructure and initiatives—including qualification reform, industry-education partnerships, and formalised work-based learning—rather than relying on market forces to produce the capabilities the industry needs. The national industry investigation reveals that Australian MMC companies are absorbing a workforce development burden that should be shared across the education and training system, through in-house training programs that are costly, non-transferable, and unsustainable at scale for the small firms that dominate the sector. The education system assessment reveals that neither VET nor higher education, nor the interface between them, is currently configured to produce the skills, qualifications, and occupational pathways that the MMC workforce requires. Addressing this misalignment is the prerequisite for MMC workforce development.

The Australian market has a distinctive coordination deficit

A central finding of this research is that the Australian MMC market faces a coordination challenge that is distinct from the challenges documented in more mature international MMC markets and that shapes workforce development priorities in specific ways. In principle, effective MMC coordination is distributed across the full value chain through an interdependent information flow, with designers, fabricators, and builders each generating and depending on information produced by the others (Lessing & Brege, 2018). In practice, this distributed model breaks down in the Australian context, because the market is predominantly horizontally integrated. This means designers, manufacturers, builders, and certifiers operate as separate organisations, sometimes without the shared systems, language, and incentives that effective MMC coordination requires. The resulting coordination failure, where manufacturers absorb the full coordination burden by default, has direct workforce implications. It reveals the absence of roles specifically configured to manage the design-to-manufacture and manufacture-to-installation interfaces, and it generates specific skill demands—particularly DfMA knowledge among designers, fabrication coordination capability, and installation management expertise—that the current workforce does not systematically possess (Ginigaddara et al., 2022).

This research proposes a distributed equivalent of Lessing's (2006) *Process Owner* concept as the appropriate workforce development response to this coordination deficit in the Australian context. Rather than developing a single vertically integrated coordinator, the Australian market requires a networked system of boundary-spanning practitioners—from the Design Project Lead and Head of Product through to the Project Manager and Assembly Integrator—each possessing sufficient knowledge of adjacent domains to fulfil their part of the distributed coordination function. The persona profiles developed in this research map this distributed system (see Appendix III), providing a practical reference framework for workforce development, training design, and curriculum reform that is grounded in the realities of horizontal integration rather than the assumptions of vertical integration that underpin most international MMC workforce frameworks (Lessing & Brege, 2018).

New occupational roles are emerging that existing frameworks cannot produce

A third central finding is that MMC adoption is generating new occupational types, including:

- grey-collar hybrid roles
- cross-disciplinary manufacturing specialists
- multi-skilled operatives.

These roles sit at the intersection of domains that training and qualification frameworks have historically kept separate. These roles might not require workers to enter entirely new qualifications but to access targeted combinations of skills that already exist across the VET and higher education systems; for instance, manufacturing process understanding for design professionals, design literacy and digital coordination capability for tradespeople. This could be in the form of modular and cross-sectoral programs that the current qualification framework cannot yet deliver but that Purpose 2 and Purpose 3 qualifications under the Training Package Organising Framework are specifically designed to enable (Skills and Workforce Ministerial Council, 2025). The Head of Product, the Production Planner, the Estimator, the Assembly Integrator, and the Compliance Inspector and Technical Certifier each embody this convergence in different ways and at different levels of the value chain.

The four workforce dynamics identified in Section 4.3, the temporal-coordination nexus, temporal resequencing of decision-making, professional boundary reconfiguration, and quality assurance and compliance adaptation, explain why these roles have emerged and why they will continue to develop as the Australian MMC market matures. Understanding these dynamics, rather than simply cataloguing the skills they generate, is the analytical contribution that distinguishes this research from prior taxonomic approaches to MMC workforce development (Assaad et al., 2022). Skills are not fixed attributes of occupations (Qualification Reform Design Group, 2024) but emergent properties of the contradictions that MMC introduces into established work systems, in this case traditional construction practice, and workforce development strategies that target isolated skill gaps without engaging with the dynamics that generate them are unlikely to achieve systemic impact.

Reform momentum exists but requires sector-specific grounding

The research was conducted at a moment of significant national reform activity in Australia's vocational education and training system. The Qualification Reform Design Group's advice to Skills Ministers, the Training Package Organising Framework introduced in July 2025, Jobs and Skills Australia's work on tertiary harmonisation and the National Skills Taxonomy, and BuildSkills

Australia's VET Future Readiness Review all point toward the structural directions that this research's findings indicate are necessary. These directions aligned more agile and responsive qualification systems, greater VET-HE integration, skills-first approaches, and improved recognition of cross-sectoral and workplace-acquired capabilities. The national reform agendas described in Section 5.1 were not designed with MMC specifically in mind, but their directions align directly with what the MMC sector needs. The MMC workforce development challenge is therefore well positioned to benefit from and contribute to these reforms, rather than requiring a separate policy response.

However, reform mechanisms without sector-specific evidence risk being designed for generic workforce mobility rather than the specific coordination, boundary-spanning, and hybrid knowledge requirements that MMC generates. This research's contribution is precisely that sector-specific evidence base, including the skills framework, workforce dynamics, persona profiles, and education system assessment that translate the general reform agenda into actionable, MMC-grounded priorities. The Future of Housing Construction Centre of Excellence at Melbourne Polytechnic represents the most significant existing investment in MMC-specific workforce development infrastructure, and its potential as a national coordination mechanism for MMC training provision depends on the kind of sector-specific intelligence this research provides.

International experience confirms the systemic response required

The international benchmarking presented in Section 3.2 reinforces the character of the challenges around MMC workforce development and provides important reference points for the reform directions that follow. Across the mature MMC markets examined, consistent lessons emerge.

First, successful MMC adoption is underpinned by deliberate investment in foundational MMC knowledge and skills across the workforce, not only among factory operatives but across design, production, digital, and sustainability roles. This reflects a recognition that MMC requires a different baseline of understanding from all workforce segments, not simply additional technical training for a subset of workers. Germany and Sweden are particularly instructive in this regard, having developed qualification frameworks and apprenticeship systems that embed manufacturing principles, lean production, and digital coordination as standard elements of built environment education rather than optional additions.

Second, mature MMC markets have invested in cultivating positive public perception and workforce awareness of MMC as a career pathway. Attracting the diverse workforce MMC requires, including workers from manufacturing backgrounds, younger entrants, and people from non-traditional construction pathways, depends on communicating the technical sophistication, career progression, and workplace conditions that MMC offers, rather than allowing public perception to default to the image of traditional site-based labour. Singapore's approach to marketing vocational and technical pathways as forward-looking and technology-enabled offers a relevant model for how Australia might reframe MMC careers to attract the diverse workforce the sector needs.

Third, effective MMC adoption at national scale has consistently been supported by a cohesive national strategy for built environment innovation, providing alignment between government agencies, industry bodies, training providers, and regulatory authorities around shared priorities and coordinated action. The United Kingdom's Farmer Review and Singapore's Built Environment Industry Transformation Map both exemplify this strategic coherence.

These international lessons do not prescribe a single model for Australia but confirm that the system-level response this research recommends is consistent with what sustained MMC adoption has required elsewhere.

5.2. Recommendations

The recommendations that follow are organised across four audiences: policy and government, industry, education and training providers, and the research community.

Recommendations for policy

The skills framework, workforce dynamics, persona profiles, and education system assessment this research has produced represent the sector-specific evidence base that policymakers need to translate the national qualification reform agenda into MMC-grounded action. The first and most immediate priority is to embed these findings into the qualification development work already underway under the Training Package Organising Framework, ensuring that the Purpose 2 and Purpose 3 qualification mechanisms being developed are informed by the specific cross-sectoral and hybrid capability needs that this project has documented. Purpose 2 qualifications that prepare learners for multiple related occupations within the construction and manufacturing interface, and Purpose 3 qualifications that develop cross-sectoral knowledge applicable across industries, represent the most promising existing mechanisms for producing the grey-collar and boundary-spanning workforce profiles that MMC demands. Policymakers should work together to develop qualifications under these purposes that specifically address the manufacturing-to-construction transition gap that the decline of Australia's manufacturing sector has left exposed.

Government should establish formal recognition frameworks for factory-based construction roles. Recognition of Prior Learning pathways should be developed that enable workers transitioning from manufacturing industries into construction to have their existing process discipline, lean manufacturing knowledge, and precision skills formally acknowledged without requiring full requalification in areas where their skill is already demonstrated. At the same time, targeted upskilling pathways should be developed alongside these recognition mechanisms, providing manufacturing workers with the construction systems knowledge, regulatory awareness, and building process understanding that their manufacturing backgrounds do not provide. This two-part approach, recognising what manufacturing workers bring while equipping them with what construction requires, directly addresses the cross-sectoral transition gap that this research has identified as one of the most significant constraints on MMC workforce supply in Australia.

Government should support the Future of Housing Construction Centre of Excellence at Melbourne Polytechnic to function as a national coordination mechanism for MMC training provision, with a specific mandate to develop accredited, transferable, and stackable MMC training products that can be delivered consistently across the national TAFE network. The Centre's current model of rapid, non-accredited short course delivery is a pragmatic and necessary response to an urgent industry need, but it has limitations in scope and depth that accredited provision alone can address. Micro-credentials represent a valuable agile training mechanism for introducing workers to MMC principles and building baseline awareness rapidly, but they are not a substitute for the deeper and transferable capability development that formally recognised qualifications provide. Government investment should therefore support both streams in parallel, treating micro-credentials as an entry point into a broader qualification pathway rather than a standalone workforce development solution.

Government should support the development of higher-level apprenticeship models for the built environment sector that integrate workplace learning in MMC factory environments with formal VET or HE study. This requires coordination across Australian Skills Quality Authority (ASQA), Tertiary Education Quality and Standards Agency (TEQSA), relevant professional accreditation bodies, and state and territory governments to address the regulatory barriers that currently prevent work-based knowledge from contributing to formal qualification profiles. A national strategy for built environment innovation that aligns government agencies, industry bodies, training providers, and regulatory authorities around shared MMC workforce development priorities, drawing on the strategic coherence demonstrated by Singapore's Built Environment Industry Transformation Map and the United Kingdom's Farmer Review, would provide the governance architecture within which these longer-term reforms can be coordinated.

Recommendations for education and training providers

VET providers should identify and contextualise existing units of competency relevant to MMC production environments, including lean manufacturing principles, quality systems, digital fabrication, and process and systems approaches, and develop skill sets and short courses that enable workers to access this content in targeted and modular form without requiring full qualification enrolment. This directly addresses the fact that MMC-specific knowledge must be embedded as a required core element of both VET and higher education curricula, not treated as an optional addition to programs designed around traditional construction practice. Architectural and engineering faculties should audit their current curricula against the design phase skill requirements documented in Section 4.2, identifying where DfMA, manufacturing constraints, logistics, and applied construction knowledge are absent or superficial, and developing specific curriculum renewals that address these gaps within existing program structures rather than waiting for full accreditation renewal cycles.

VET providers and universities should develop formally articulated pathways that enable credit transfer in both directions, between VET and higher education. These pathways should enable targeted and partial access to cross-boundary knowledge rather than requiring full qualification completion, drawing on the Purpose 3 qualification mechanism and the micro-credential and stackable credential models already being piloted in other sectors. Factory-based and work-integrated learning arrangements should be developed in partnership with MMC-engaged companies and contractors, enabling students and workers to acquire MMC-relevant knowledge in the production environments where it is most meaningfully learned and most directly applicable to practice.

Micro-credentials have an important role to play as agile and responsive training products that can reach industry quickly and introduce workers to MMC principles without the delays of full qualification development cycles. However, their limitations in scope and depth must be explicitly acknowledged when designing training pathways. Micro-credentials develop awareness and baseline understanding but not the sustained and cross-domain capability that effective MMC practice demands. Education and training providers should therefore position micro-credentials as entry points into broader learning pathways, designing them with vertical stackability toward accredited skill sets and qualifications and complementing them with deeper program offerings that build the cross-boundary knowledge and applied capability that short-form credentials alone cannot develop.

VET providers and universities should work toward integrated qualification structures that combine vocational and professional learning in ways that cultivate grey-collar capabilities, requiring coordination between ASQA, TEQSA, and professional accreditation bodies. The development of dual-sector programs that enable tradespeople to develop design literacy alongside their trade qualification, or design graduates to acquire manufacturing knowledge alongside their professional degree, would directly address the pathway gap this research has identified as the most significant systemic constraint on MMC workforce development. Drawing on Germany’s dual system, Australian providers should work toward arrangements that give factory-based and industry-embedded learning the same formal standing as classroom-based study. The built environment sector does not need to design these models from scratch. Healthcare and aviation have both developed integrated qualification pathways that successfully combine workplace practice with formal academic study within accredited frameworks, and the institutional mechanisms, articulation arrangements, and curriculum design principles they have developed offer directly transferable lessons for the construction and manufacturing interface that MMC requires. It should be noted that both sectors operate under more prescriptive licensing and certification requirements than the built environment, which has partly enabled the development of integrated pathways in ways that the more fragmented regulatory landscape of construction has not yet facilitated. Direct replication is therefore not straightforward, but the underlying design principles, including formal recognition of workplace learning, structured articulation between vocational and professional pathways, and co-delivery arrangements between employers and education institutions, are transferable and offer a practical starting point for the built environment sector.

Professional accreditation bodies for architecture and engineering should review their accreditation standards to explicitly include manufacturing principles, DfMA, and applied construction knowledge as required curriculum elements. Without reform at the accreditation level, individual institutions seeking to innovate face structural barriers that prevent them from embedding the cross-domain knowledge MMC demands, regardless of their willingness to do so. Coordination between professional accreditation bodies, ASQA, and TEQSA to develop a shared framework for cross-domain capability development would address the institutional separation that currently prevents the grey-collar and hybrid qualification pathways that MMC requires from being developed within the existing regulatory structure.

Recommendations for research

Research should document and evaluate the effectiveness of the Future of Housing Construction Centre of Excellence as a national model for MMC training delivery, tracking the uptake and impact of its programs across the TAFE network and assessing whether its co-design and industry partnership model achieves the coordination of MMC training provision that the current fragmented landscape lacks. Research should also evaluate the scope, depth, and transferability of micro-credentials being developed for the MMC sector, assessing whether they are functioning as entry points into broader learning pathways or as standalone products that do not contribute to formal qualification progression.

Research should investigate how the Purpose 2 and Purpose 3 qualification mechanisms under the Training Package Organising Framework can be specifically applied to MMC cross-sectoral transitions, working with BuildSkills Australia and the Manufacturing Industry Skills Alliance to design and pilot qualification structures that address the manufacturing-to-construction transition gap. Research should also examine how the persona profiles developed in this project map onto existing and emerging career pathways within MMC-engaged organisations, documenting how workers enter, develop within, and progress through hybrid MMC roles over time, and identifying the qualification components, workplace learning experiences, and credential recognition steps required at each transition point.

Research should examine how the distributed coordination architecture proposed in this project, the horizontal equivalent of Lessing's Process Owner, functions in practice across different Australian MMC company profiles and delivery models. Comparative research examining how other jurisdictions with horizontally integrated MMC markets, including the United Kingdom and New Zealand, have addressed similar coordination and workforce development challenges would provide valuable additional evidence for Australian policy development.

Research should also investigate the relationship between MMC adoption and workforce diversity, an area this project has not directly addressed but that warrants dedicated investigation. MMC's factory-based production model, controlled working environments, and process-oriented workflows have the potential to reduce the physical and cultural barriers that have historically constrained the participation of women and other underrepresented groups in the construction workforce. Understanding whether and how MMC is realising this potential in the Australian context, and what workforce development, recruitment, and workplace culture conditions enable it, would contribute evidence that is currently absent from the Australian MMC literature.

Finally, research should address the relationship between MMC adoption and sustainability skills. As discussed in the Project Overview Section, MMC offers well-documented environmental benefits, including reduced material waste, lower embodied carbon, and greater energy efficiency in factory-controlled production, and Australia's built environment sector faces intensifying pressure to develop workforce capabilities aligned with the twin transition toward both digital and sustainable construction. This research has focused on the digital and process dimensions of MMC workforce development and has not systematically addressed the sustainability skills that a genuinely future-ready MMC workforce requires. Future research should examine what sustainability skills are needed across the MMC value chain, how they intersect with the technical and coordination capabilities documented in this project, and how the qualification frameworks and education systems assessed in Section 4.2 can be reformed to integrate sustainability as a foundational rather than supplementary dimension of MMC workforce development.

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APPENDIX I. METHODOLOGY

This project adopted a mixed-methods research design integrating five complementary methods. An international market review systematically mapped MMC-related training and education programs across a broad range of international contexts. A cross-country comparison examined workforce development approaches across selected MMC-mature markets to identify transferable lessons for the Australian context. A national industry survey provided an overview of MMC market trends in Australia, including workforce challenges and perceived drivers and barriers to adoption. A national industry consultation drew on in-depth interviews with industry practitioners, educational providers, and industry experts to explore perceived skill needs and workforce development priorities in greater depth. Finally, national observational fieldwork validated and enriched findings from the preceding methods through direct observation of real workplace practices in MMC-engaged companies and discussions with key state-level bodies. Ethics approval for data collection involving human participants was obtained through the Monash University Human Research Ethics Committee (MUHREC)—Project ID: 47960. The following sections provide a detailed overview of each research method.

Market review of international MMC training programs

To ensure consistency and replicability, the review followed a systematic search approach. Predefined search terms were applied systematically across equivalent search platforms and databases within each country's education system, with structured inclusion and exclusion criteria applied consistently across all identified offerings, and a standardised data extraction framework employed to enable meaningful cross-country comparison. The review was conducted iteratively, with search terminology progressively refined as country-specific nomenclature and training contexts were encountered, ensuring comprehensive coverage across diverse national education systems. Searches were conducted between April and June 2025, with findings reflecting the training provision available at the time of data collection.

Search terminology

The primary search terms employed were 'MMC' and 'Modern Methods of Construction'. Recognising the terminological variation across countries and industry contexts, an evolving list of synonymous terms was also applied, including but not limited to:

> *Industrialised Construction, Industrialised Building, Offsite Construction, Offsite Manufacturing, Manufactured Construction Technology, Modular Integrated Construction, Manufactured Housing, Advanced Methods of Construction, Modular and Offsite Construction, Manufactured Construction, and Modular Component Manufacturer*s.

To capture relevant training offerings not explicitly marketed using MMC-specific terminology, supplementary keywords reflecting specific MMC content areas, skills, or components were incorporated. These included, but were not limited to:

> *Construction, Module, Modular, Volume, Volumetric, Prefabrication, Prefab, Prefabricated, Offsite, Off-site, Industrial, Industrialised, Manufactured, Manufacturing, Digitisation, Digital, Onsite, Install, Installation, Component, 3D, 3D Printing, Integrated, Circular, Fabrication, Fabricated, Productivity, Production, Assemble, Modern, Virtual, Precast, and Lean.*

Inclusion and exclusion criteria

Training offerings were included in the review if they explicitly targeted MMC or its synonyms, typically indicated in the training title, or if they focused on specific and closely aligned MMC knowledge and skills, such as modular construction, digitalisation, lean construction, or Design for Manufacture and Assembly (DfMA). Offerings containing relevant but generically framed skills, without explicit reference to MMC methods or technologies, were excluded. For example, the New Zealand Certificate in Timber Structure Manufacture was included, given its clear focus on MMC technologies, involving wall frame manufacture, roof truss manufacture, and flooring cassette manufacture. In contrast, the New Zealand Certificate in Engineering Fabrication was excluded, as it primarily addresses general welding and fabrication standards without specific reference to prefabrication, off-site manufacturing, or other MMC methods. It is also important to note that the review's scope extended beyond the traditional construction sector to include adjacent and relevant disciplines (i.e., manufacturing, civil and structural engineering, and architecture.

Data extraction

Each identified MMC-relevant training offering was recorded using a structured extraction form. Where available, the following data points were recorded: country; training title; training area or terminology used; MMC specificity, categorised as either explicit or adjacent; training type, such as formal qualification, informal short course, or micro-credential; qualification or training level; curriculum owner or developer; training provider; industry partners; indicative course content; delivery method, including in-person, online, or work-based options; target audience, such as new entrants, upskilling trades, or upskilling professionals; and entry requirements or articulation pathways. A tag-based schema was applied across all entries to support consistent cross-country comparison and thematic analysis.

Cross-country comparison of MMC workforce development and training offerings

For each selected country (Sweden, Germany, the UK, Singapore, and the USA), a two-fold analytical approach was implemented to examine both the policy landscape shaping MMC workforce development and the training offerings emerging from it.

First, a systematic document review was conducted to identify and map governmental initiatives, policy documents, and industry reports relevant to MMC workforce development in each country. Sources were purposively selected to capture the breadth of national policy activity, including national government reports and policy frameworks; publications from national and regional skills councils, industry training boards, and professional associations; and relevant legislation, regulations, and strategic plans addressing housing supply, construction workforce development, and industry transformation. Where MMC-specific workforce strategies were absent (as was frequently the case), broader built environment workforce development and digitalisation agendas were examined, recognising that MMC-relevant policy provisions are often embedded within wider industry transformation initiatives rather than addressed through dedicated MMC programs. Searches were conducted between April and June 2025. A structured extraction form was applied consistently across all identified documents to capture key information, including the responsible body, initiative description, focus area, anticipated impacts and outcomes, current status, and operational timeframe.

Second, the identified policy landscape was analysed in parallel with the findings from the international market review of MMC training programs. This comparative analysis enabled the identification of each nation's specific approach to MMC workforce development, including the underlying governance structures and key stakeholders involved. It also facilitated an examination of the relationship between policy intent and training provision. In other words, this process explored how governmental strategies and industry initiatives shape the development and evolution of MMC training offerings over time.

National industry survey

The national industry survey sought quantitative and qualitative insights to better understand the current state of MMC adoption in Australia, identify key knowledge and skill gaps, and assess future training needs. The survey targeted companies with significant engagement with MMC and other industrialised construction methods across design, manufacturing, and assembly phases of the value chain.

The survey instrument was structured across four sections:

- organisational profile, covering respondent demographics, key organisational characteristics, and geographical reach;
- MMC market segment and adoption, covering current MMC approaches and supporting methodologies;
- MMC market dynamics, covering perceived adoption drivers and implementation barriers; and
- MMC skills and development, covering knowledge and skill gaps, training investment, and professional development.

The survey was administered through Qualtrics and remained open for seven weeks through June and July 2025. It was distributed through two channels: publicly via social media platforms including the Building 4.0 CRC and Future Building Initiative networks, and through direct invitation to industry contacts provided by BuildSkills Australia. All responses were recorded anonymously. A total of 43 industry participants completed the survey, representing a range of roles, company sizes, and geographic regions across Australia. A detailed overview of respondent demographics is provided in Appendix II.

Industry consultation: Semi-structured interviews

Following the survey, participants were invited to take part in a semi-structured interview to explore in greater depth their experiences and perspectives on current MMC skill gaps and future training needs. Participation was not restricted to survey respondents; the invitation was also extended more broadly to industry practitioners, educational providers, and other relevant stakeholders. All interviews were conducted virtually via Zoom videoconferencing across August and September 2025. Interview duration ranged from 20 minutes to one and a half hours, reflecting variation in participants' availability and the depth of their engagement with the topics discussed.

Table I.1 Interviewee demographics

Demographics	Description	N
Role	C-Suite/Owner	10
	Senior Management	5
	Executive Leadership	3
	Technical/Professional Staff	2
	Technical Leadership	1
	Total	**21**
Company activity	Consultancy	3
	Design/Engineering	3
	Manufacturing	3
	Design/Engineering & Manufacturing	3
	Supplier	3
	Builder	2
	Developer	2
	Peak Body	1
	Total	**20**
Company MMC type approach	Pre-manufacturing components	4
	Volumetric	4
	Panelised & Volumetric	2
	2D panelised	1
	Additive	1
	Site works improvement	1
	Panelised & Pre-manufacturing components & Volumetric	1
	N/A	6
	Total	**20**

A total of 21 industry participants were interviewed across 20 interviews, as one interview involved two representatives from the same company. Interviewees included representatives from MMC companies, independent consultants, VET providers, industry associations, and stakeholders with direct experience of unsuccessful MMC ventures, providing perspectives on both current practice and lessons from failure. Table I.1 provides an overview of interviewee profiles and the companies they represented.

National observational fieldwork

National observational fieldwork was conducted to validate and enrich findings from the preceding research methods through direct engagement with real-world MMC practices. Site visits documented production and manufacturing practices, workforce structures, and team dynamics, while also identifying key regional differences affecting MMC implementation across Australian states. In addition to company visits, meetings were held with academic research groups and state-level government bodies engaged in workforce, skills, and policy development relevant to MMC. Visits were exploratory in nature, lasting between one and two hours, and followed an organic process shaped by each organisation's context. In most MMC facilities, visits took the form of a guided facility tour during which questions emerged in response to what was observed on the factory floor or construction site. In other cases, visits began with a brief company overview provided by a senior representative, followed by a tour of the facility. Observational data were recorded through field notes and, where permitted, photographic documentation, and all visits were conducted with the informed consent of participating organisations.

A total of 20 visits were conducted across five states: Queensland (QLD), Victoria (VIC), South Australia (SA), Western Australia (WA), and New South Wales (NSW). Visits were undertaken between September 2025 and February 2026 and comprised three categories of organisation. Sixteen visits were conducted at MMC-engaged companies spanning volumetric, panelised, and pre-manufacturing approaches. Two visits were made to academic research groups with relevance to workforce and industry transformation, including the Future of Work Institute at Curtin University and the Factory of the Future at the Tonsley Innovation District in SA. Two visits were made to state government bodies engaged in workforce and skills policy, the Victorian Skills Authority and Student Pathways and Careers SA. Table I.2 provides an overview of the companies visited by state and MMC type.

Table I.2 MMC-engaged companies visited during observational fieldwork, by state and MMC type.

Location Australian State	Company MMC type approach				
	Volumetric	Panelised	Pre-manufacturing components (non-systemised primary structure)	Pre-manufacturing (non structural assemblies & sub-assemblies)	Total N
Queensland	5				5
Victoria	2		1	1	4
South Australia	3	1			3
Western Australia	2	1			3
New South Wales		1			1
Total	11	3	1	1	16

APPENDIX II. NATIONAL SURVEY FINDINGS

As described in Appendix I, the national industry survey gathered data across four thematic areas: organisational profile, MMC market segment and adoption, MMC market dynamics, and MMC skills and development. Findings from the third area, covering perceived drivers and barriers to MMC adoption, were presented and discussed in Section 4.1. This appendix presents extended findings across the remaining three areas, providing a more detailed demographic and operational profile of surveyed organisations and a fuller account of their MMC adoption patterns and workforce development experiences than the main report section presents. These findings are intended to serve as a reference resource for readers seeking greater depth on the survey sample and its characteristics.

Organisational profile

Key takeaways:

- *Nearly half of respondents (47.5%) have over 10 years of MMC experience, while only 21% have 1-3 years.*
- *The sector is dominated by small but mature firms—72% have operated for 11+ years, yet 44% employ fewer than 20 people, significantly constraining internal training capacity.*
- *Respondents are predominantly senior-level professionals working across the full project lifecycle.*
- *Most organisations (79%) serve clients and customers in both metropolitan and non-metropolitan areas, demonstrating broad geographic reach across Australia's vast distances.*

Respondent profiles

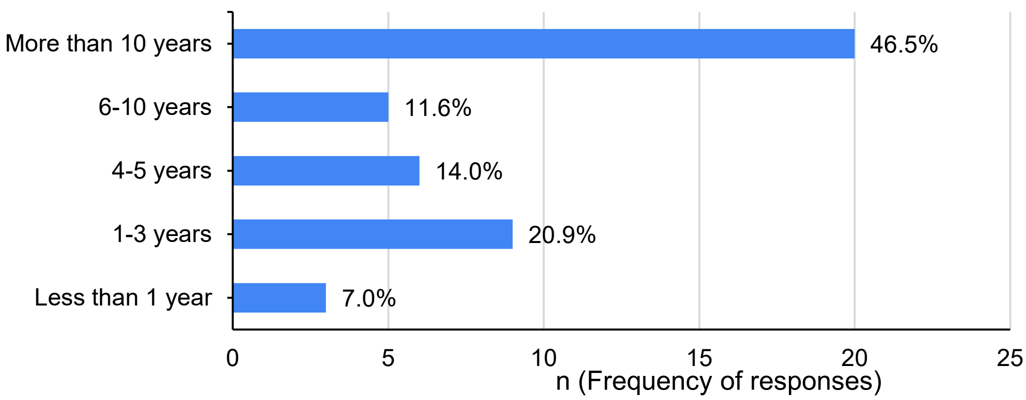

Figure II.1 Years working with MMC (n=43)

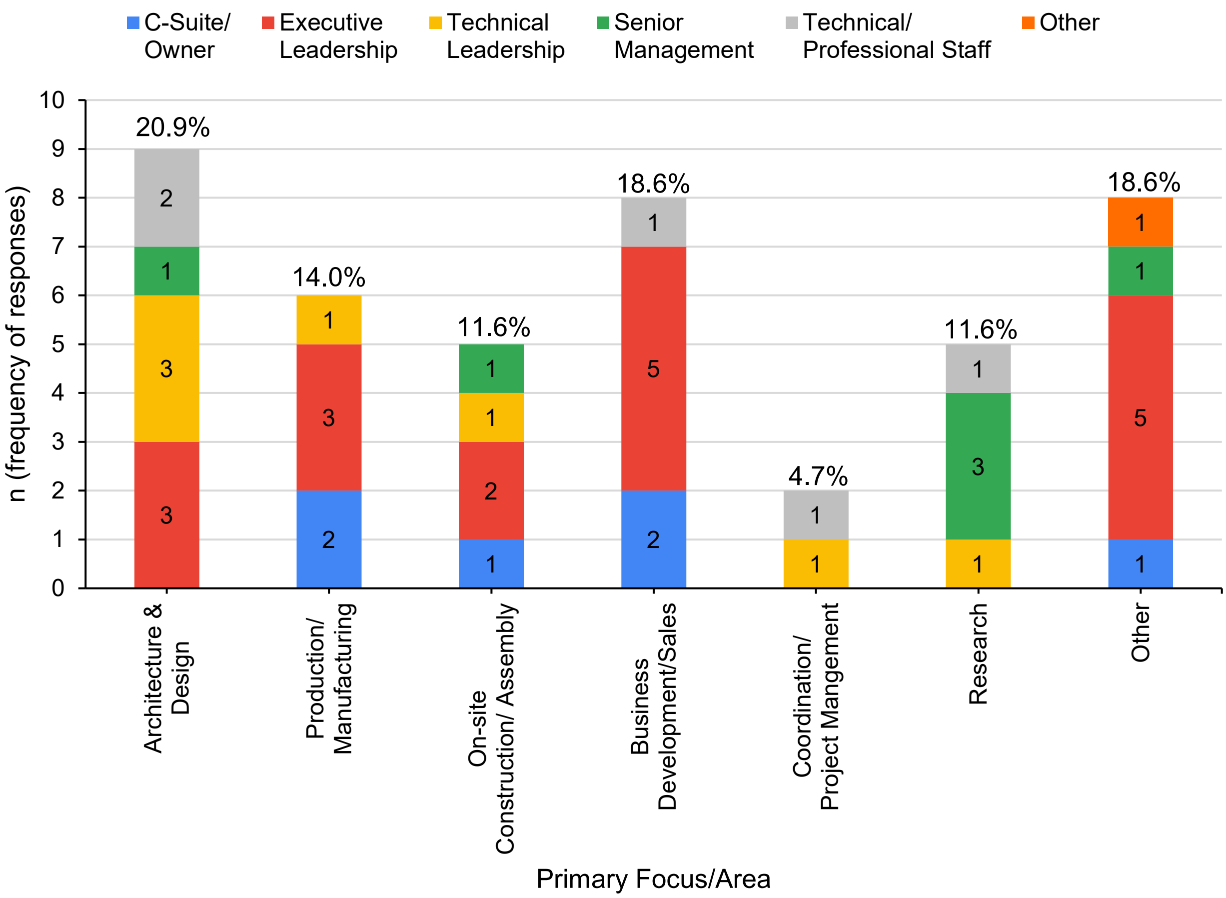

Figure II.2 Respondent roles and primary role focus/area (n=43)

Respondent company information

The largest single group was identified as manufacturers (26%), followed by main contractors/builders (14%), design and engineering services (14%), and consultants/advisors (12%). However, one in five respondents (21%) selected 'Other', predominantly describing multi-disciplinary operations that span multiple categories such as "Architectural, Project Management & Construction", "A mix of supplier and advisor", or "Manufacturer and the Builder".

Table II.1 Core business (n=43)

Core Business	n	%
Manufacturer: Produces prefabricated components or complete modules in a factory setting as their primary output.	11	25.6%
Other (please specify)	9	20.9%
Main Contractor/Builder: Primarily undertakes and manages the construction or assembly of buildings and infrastructure on-site.	6	14.0%
Design and Engineering Services: Primarily provides architectural, engineering, or other design services for construction projects.	6	14.0%
Consultant/Advisor: Primarily provides expert advice and services related to construction strategy, design, implementation, technology, etc.	5	11.6%
Supplier: Primarily supplies materials, components, or systems used in construction projects.	3	7.0%
Developer: Primarily initiates and manages construction projects for sale or lease.	2	4.7%
Specialist Subcontractor: Primarily undertakes and manages construction services or trades under contract to main contractors or developers.	1	2.3%
Total	**43**	**100%**

Geographic coverage reveals both concentrated and dispersed operational patterns. Thirty-five per cent of organisations reported operating nationally across all Australian states and territories, while among those focusing on specific jurisdictions, New South Wales was most frequently selected (40% of all respondents). Most organisations (79%) serve clients and customers in both metropolitan and non-metropolitan areas, reflecting a broad geographic reach.

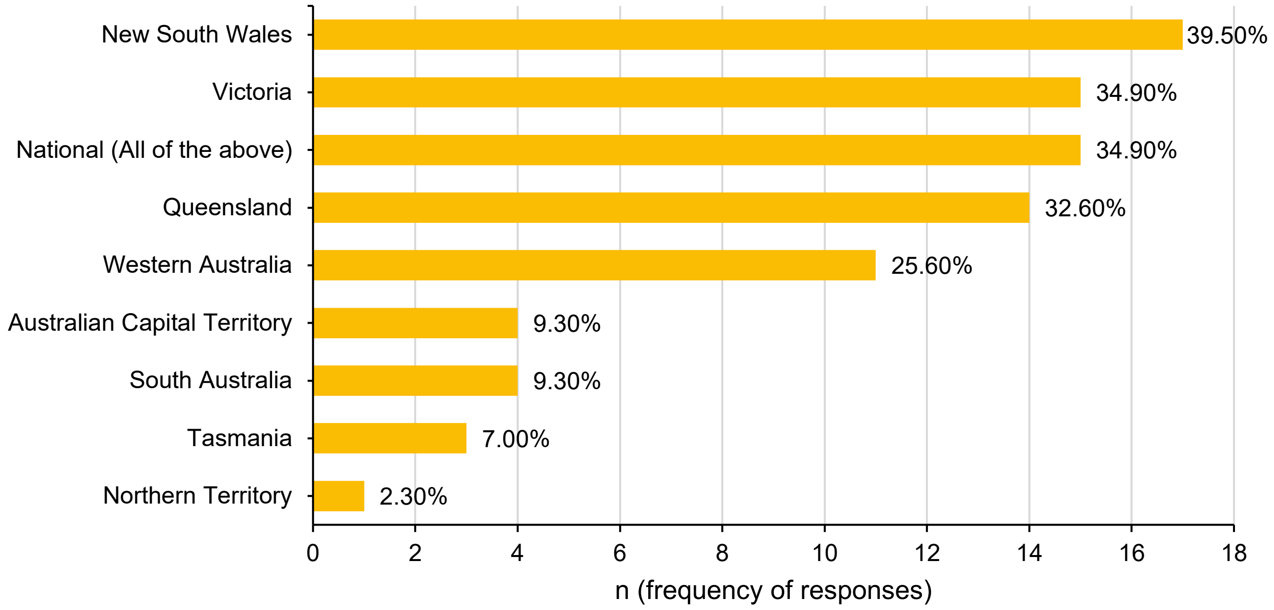

Figure II.3 Australian jurisdictions of operation (n=43)

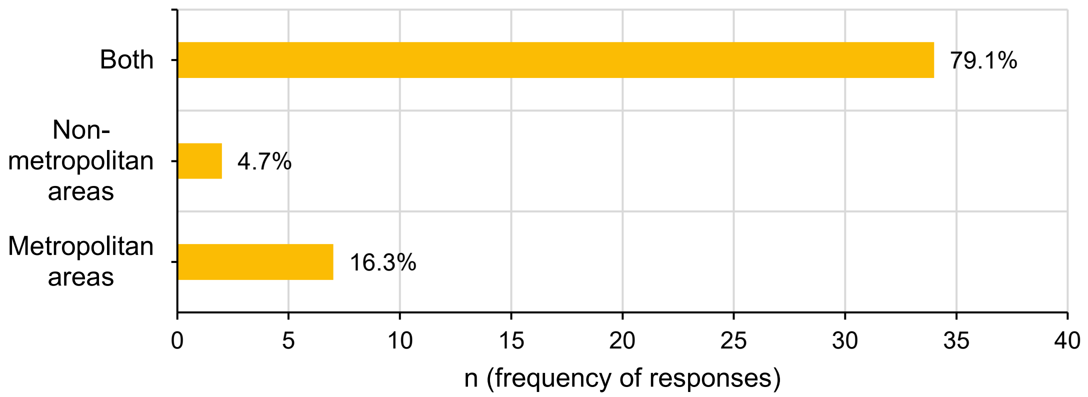

Figure II.4 Geographic service coverage (n=43)

When asked about international operations, the largest group (44%) reported operating only within Australia, suggesting a predominantly domestic market focus. However, 40% described themselves as Australian businesses with international operations or clients, indicating substantial export activity or cross-border service delivery. A smaller proportion (16%) identified as part of global businesses with operations in Australia—typically multinational firms with Australian subsidiaries or divisions.

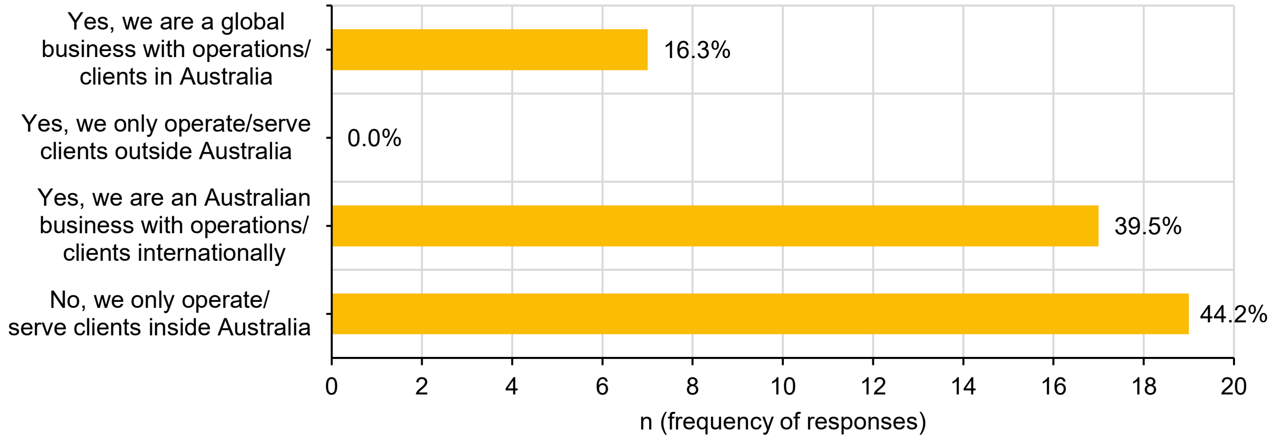

Figure II. 5 International reach (n=43)

MMC market segment and adoption

Key takeaways:

- *The sector is residential-led (81%) but broadly diversified, with most organisations operating across multiple building types and deploying multiple MMC methods simultaneously—23 different combinations were reported, with offsite approaches (3D volumetric, 2D panelized, sub-assembly) dominating.*
- *MMC adoption is polarised, with approximately one-third achieving extensive or entirely MMC-focused operations while one-quarter remain at minimal or limited adoption stages.*
- *Supporting methodologies show varying maturity—DfMA leads with 55% at significant or full integration, Lean at 50%, while Digital Productivity Tracking reveals a pronounced divide (28% fully integrated vs. 45% at non-adoption or limited stages), reflecting resource and capability constraints, particularly among smaller firms.*

Current MMC approach and methods

MMC type adoption reveals a sector dominated by off-site construction approaches, which were understood using the framework by Cast Consultancy (2020). Three-dimensional volumetric pre-manufacturing emerged as the most prevalent approach, selected by 51% of respondents, followed closely by 2D panelized pre-manufacturing at 44% and sub-assembly pre-manufacturing at 40%. However, these headline figures mask a more complex pattern of adoption—organisations rarely specialise in single methods but instead deploy multiple approaches depending on project requirements.

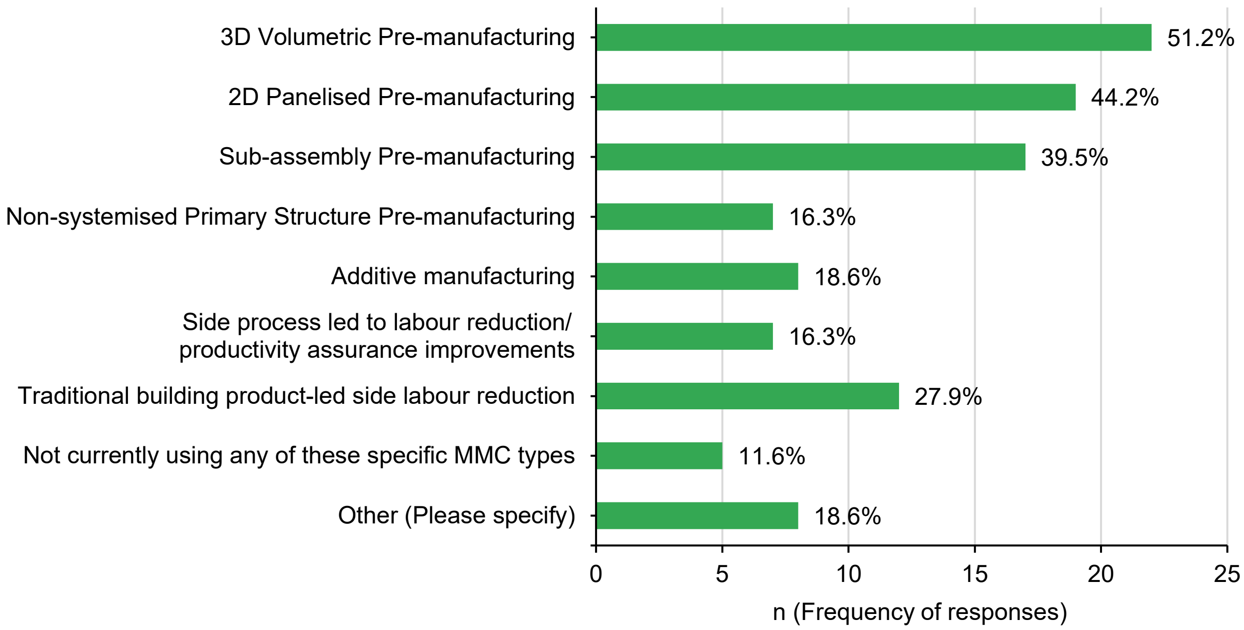

Figure II.6 MMC type (n=43)

The data shows 23 different combinations of MMC types across respondents, reflecting significant diversity in how organisations configure their technical capabilities. While roughly 30% reported using only one MMC type, the majority employ multiple methods. Among single-type specialists, 3D volumetric dominated, with six organisations focusing exclusively on this approach. For organisations using two methods, the most common pairings were 3D volumetric with 2D panelized, and 2D panelized with sub-assembly (three organisations each), suggesting complementary capabilities that allow flexibility across different project scales and building elements. At the other end of the spectrum, two organisations reported using all seven MMC types listed, indicating highly diversified technical platforms.

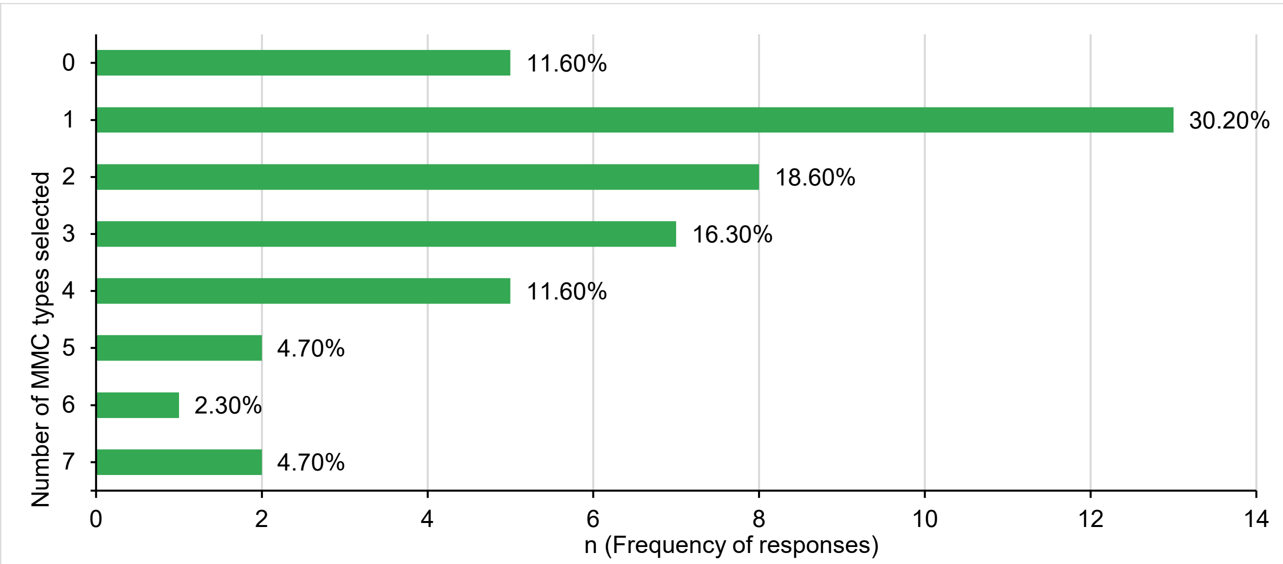

Figure II.7 Number of MMC types used (n=43)

A clear pattern emerges when examining off-site versus on-site methods, categorised using the UK's framework for classifying emerging construction approaches (Cast Consultancy, 2020). Offsite approaches—including 3D volumetric, 2D panelised, sub-assembly, non-systemised primary structure, and additive manufacturing—accounted for the overwhelming majority of selections. In contrast, onsite MMC methods such as traditional building product-led site labour reduction and site process optimisation appeared far less frequently and almost always in combination with offsite techniques.

Approximately half demonstrate extensive or entirely MMC-focused operations, while one-quarter report minimal or limited adoption, indicating uneven industry adoption.

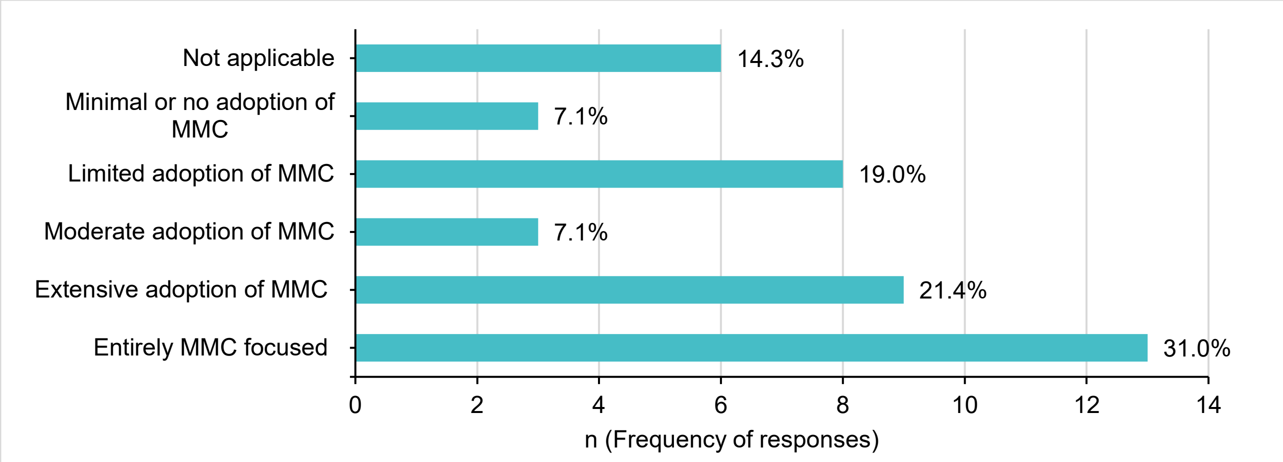

Figure II.8 Overall adoption of MMC (n=42)

Adoption of supporting methodologies

Adoption patterns for three key supporting methodologies—Lean management, DfMA, and Digital Productivity Tracking—reveal varying industry maturity levels and a notable digital divide. DfMA demonstrates the strongest trajectory, with 55% of organisations achieving significant or full integration and only 19% at non-adoption or limited stages. This strong performance aligns with the 66% who identified DfMA as a critical skill gap, suggesting organisations recognise its importance and are actively embedding these capabilities.

Lean management shows more graduated uptake, with 50% at significant or full integration, but adoption is more evenly distributed across all levels, possibly because Lean requires broader organisational culture change beyond technical capabilities.

Digital Productivity Tracking reveals a pronounced polarisation—28% have fully integrated digital tools while 45% remain at non-adoption or limited stages, with only 10% in the middle. This bimodal distribution suggests organisations either commit fully to data-driven management or do not meaningfully engage, likely reflecting resource constraints and technical capabilities that disproportionately affect smaller firms.

Given that these three items showed acceptable internal consistency (Cronbach's $\alpha = 0.807$), organisations tend to adopt them together, pointing to a broader sectoral divide between firms pursuing comprehensive MMC enablement through integrated methodologies versus those taking selective approaches. For workforce development, this means training must address not only MMC construction methods but also these supporting practices, particularly for organisations in early adoption stages.

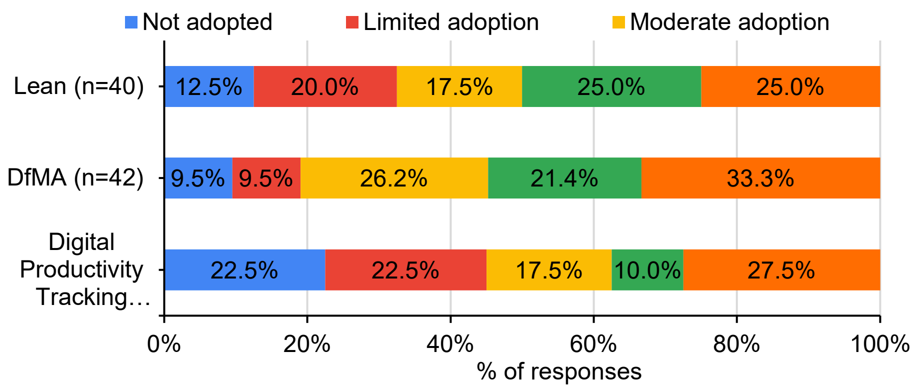

Figure II.9 Adoption of supporting methodologies.

MMC skills and development

Key takeaways:

- *Commercial and procurement capabilities represent the most critical knowledge and skill gap (85%), followed by digital design and information management (74%), MMC typology (70%), and DfMA (66%), with gaps clustering around the commercial-contractual-regulatory nexus rather than technical execution—suggesting the workforce is more constrained by inability to structure deals, navigate approvals, and operate viable business models than by MMC techniques.*
- *Only 58% of organisations have invested in MMC-related training despite widespread recognition of skill deficits, revealing a significant gap between identified needs and action, likely reflecting resource constraints, unclear pathways, and lack of accessible programs, particularly challenging for the 44% of firms with fewer than 20 employees.*
- *Organisations prefer flexible, modular learning—short sessions (maximum 2 hours) and CPD modules (both 48%)—over intensive full-day or multi-day programs, with 70% of those investing in training developing their own in-house programs.*

Perceived MMC-related knowledge and skills gaps

Knowledge and skill gap identification reveals a clear hierarchy of capability deficits, with commercial and procurement challenges dominating industry concerns. An overwhelming 85% of respondents identified commercial, procurement, and contractual aspects as a critical gap—by far the highest across all assessed domains. This is followed by digital design and information management at 74%, MMC typology knowledge at 70%, and Design for Manufacture and Assembly at 66%. These four areas form a critical upper tier where the majority of the industry recognises significant capability shortfalls. Lower in the hierarchy, but still substantial, are Lean management principles (56%), project management tools (50%), and off-site production and quality management (48%), where perceptions are more divided, with roughly half seeing gaps and half not.

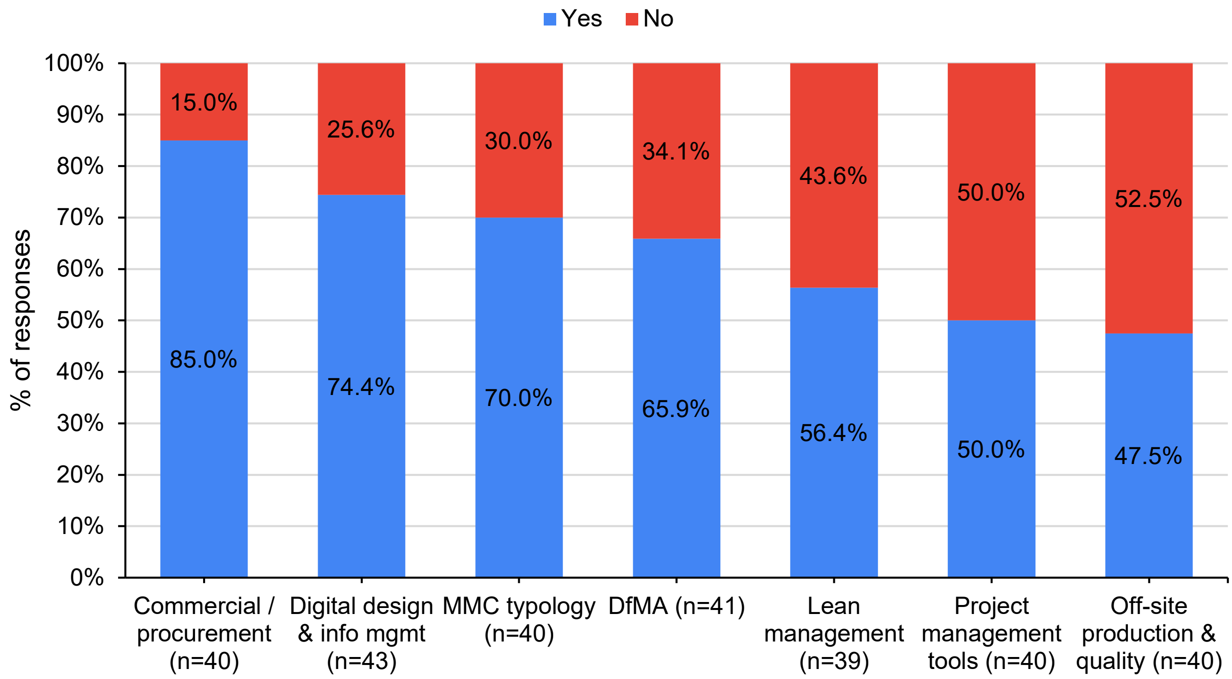

Figure II.10 Perceived gaps to MMC adoption in Australia

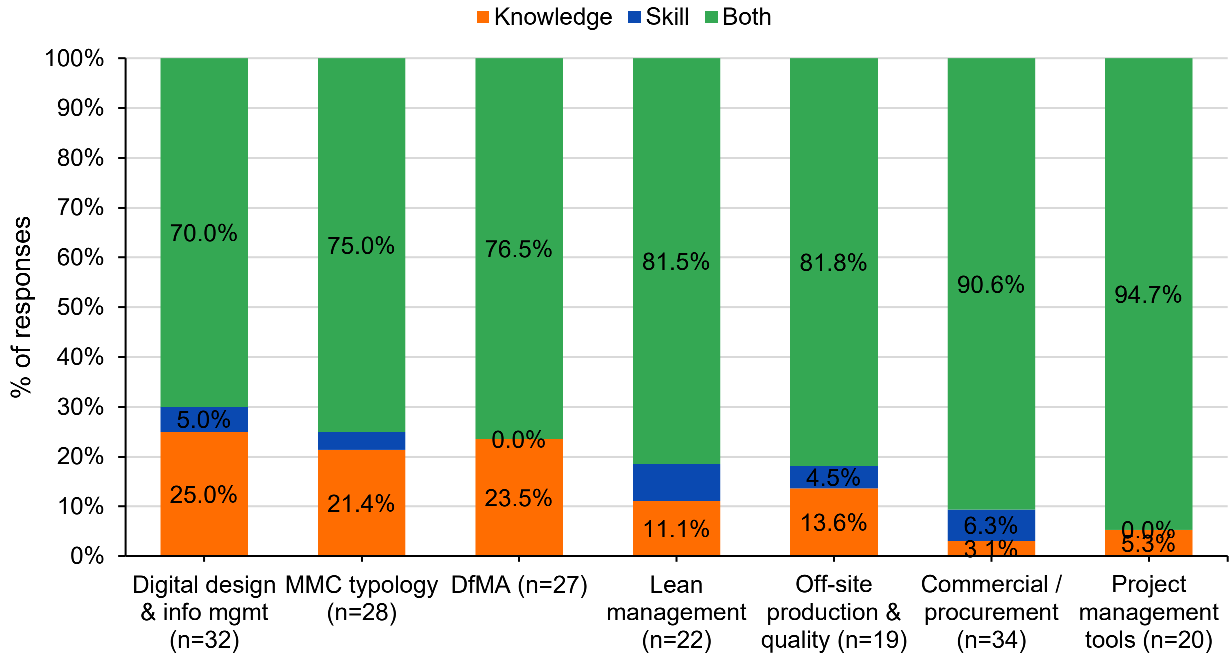

Figure II.11 Type of gap: knowledge, skill, or both

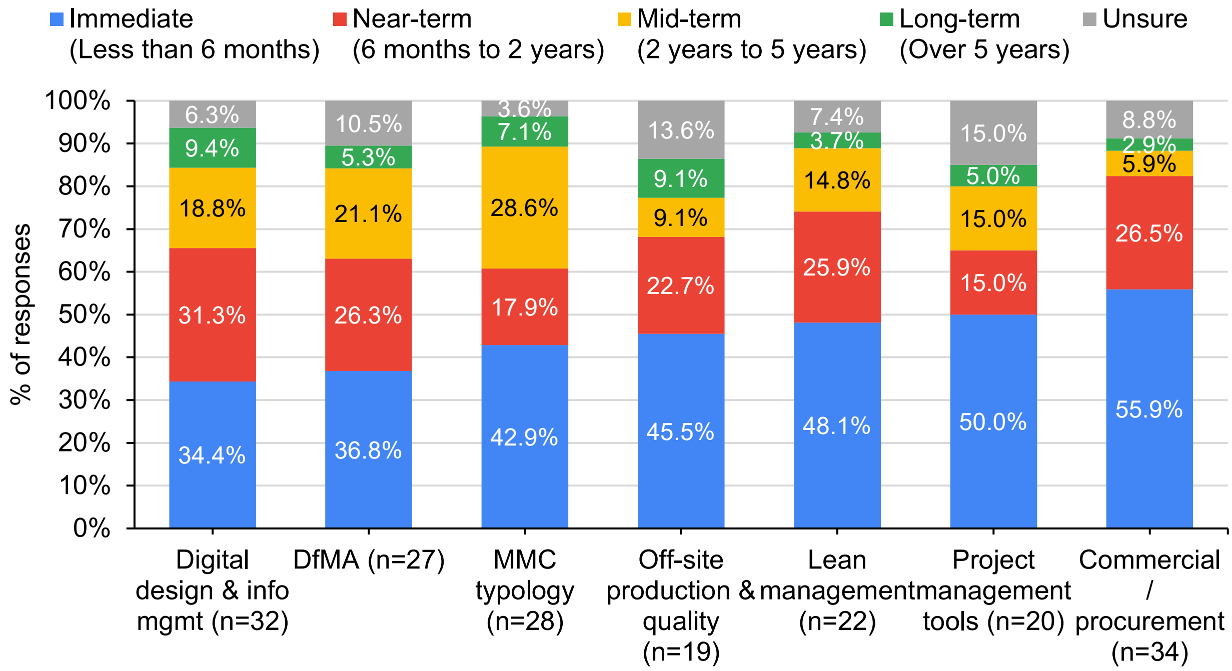

Figure II.12 Expected timeframe for this gap to become a critical need

APPENDIX III. PERSONA PROFILES ACROSS THE MMC VALUE CHAIN

This appendix presents foundational skills and key persona profiles that characterise the workforce required to support effective MMC delivery. The profiles are organised by phase and describe the technical and interpersonal skills associated with each role, drawing on findings from the national industry consultation, observational fieldwork, and the broader qualitative analysis underpinning this project (see Section 4). The profiles are intended to serve as practical reference points for workforce development, training design, and curriculum reform, illustrating the specific capabilities that distinguish MMC roles from their counterparts in traditional construction practice.

A recurring finding across the national industry consultation and observational fieldwork is that effective MMC practice demands a mindset shift rather than a knowledge addition. This mindset distinguishes workers who thrive in MMC environments from those who struggle to transition from traditional construction practice. At the core of this orientation is systems thinking, the capacity to understand individual actions and decisions as part of an interconnected whole rather than isolated tasks. This is reinforced by a process-oriented mindset that prioritises anticipation and continuous improvement over reactive problem-solving, and by lean thinking principles that provide a practical framework for pursuing efficiency, eliminating waste, and sustaining quality across the full value chain. Digital literacy enables this integrated vision to function in practice, supporting coordination and collaboration across phases and between organisations. Underpinning all of these is a general awareness of MMC typologies, which cultivates an understanding of the broader landscape within which each role sits and the specific constraints and opportunities that different product types present. These five foundational skills (Table III.1) constitute the baseline capability required of all workforce segments engaged in MMC delivery, regardless of phase or occupational background.

Table III.1 MMC foundational skills

Foundational skill	Description
Systems thinking	Understanding how individual actions and decisions cascade through the full value chain, and how changes in one part of the system create constraints or opportunities elsewhere.
Process-oriented mindset	Understanding that MMC is a manufacturing system, not a collection of tasks. This requires anticipatory problem-solving and continuous improvement orientation over the reactive, on-site firefighting culture common in traditional construction.
Lean thinking principles	Familiarity with core Lean concepts including waste identification (the 8 wastes), value stream thinking, pull-based flow, Takt time, and continuous improvement (kaizen). These principles underpin production planning, procurement, logistics, and quality management across all MMC roles, not just factory floor positions.
Digital literacy	Ability to engage with digital tools, platforms, and documentation systems relevant to the role. The specific tools and level of fluency required differ by position, but a baseline comfort with digital work environments, cloud-based systems, and data-informed decision-making applies across the full value chain.
General awareness of MMC typologies	Understanding the distinctions between panelised systems, volumetric/modular construction, hybrid approaches, and other offsite methods such as cross-laminated timber and 3d printing. All roles benefit from knowing where their work sits within the broader MMC landscape and how their product type's constraints and advantages differ from other typologies.

Findings from the national survey, industry consultation, and observational fieldwork have informed the skill requirements associated with key roles and occupations across the MMC value chain. The persona profiles presented focus on the occupations most significantly affected by the transition to MMC, as identified through the research (Figure III.1). A total of 12 persona profiles has been developed across four streams: design, manufacturing, assembly/installation, and compliance. The compliance persona is presented separately given the extent to which MMC disrupts traditional inspection and certification practices in ways that differ from all other streams.

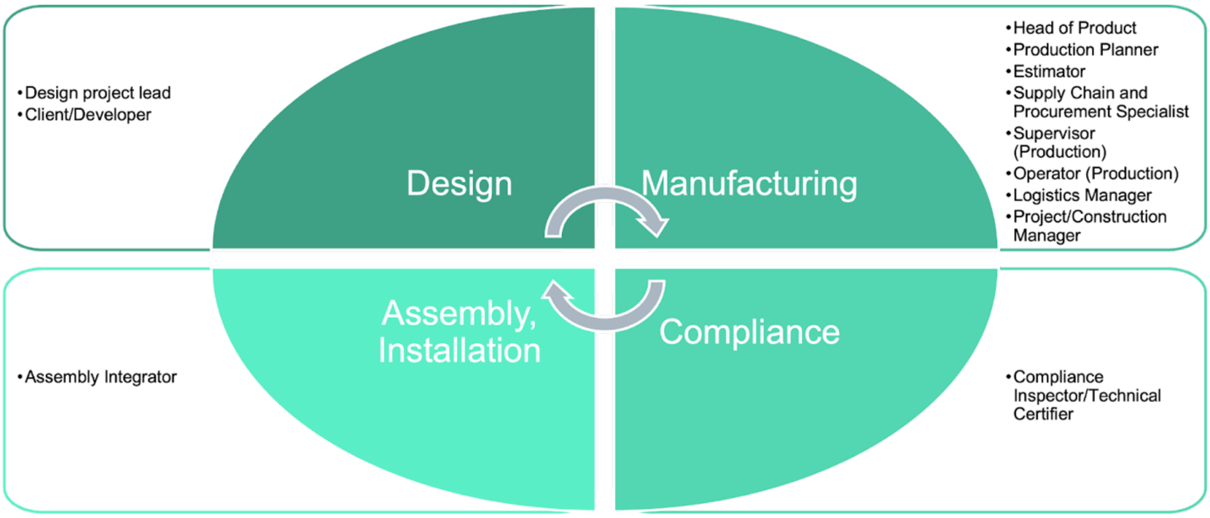

Figure III.1 Key persona profiles across the MMC value chain.

Each profile includes a brief role description, which in some cases characterises a traditional occupation with an evolved MMC skill set and in others describes an emerging role or occupational type that has no direct equivalent in traditional construction practice. Skills are presented across two categories for each profile:

- **Technical skills** refer to the domain-specific knowledge, methods, tools, and procedural capabilities required to perform the role effectively in an MMC context. These include both knowledge that extends or adapts existing trade and professional expertise and knowledge that is new to the built environment workforce.
- **Interpersonal skills** refer to the behavioural, communicative, and relational capabilities required to work effectively within MMC's integrated and cross-disciplinary delivery environment. These include collaboration across professional boundaries, communication under compressed timeframes, adaptability to process-driven work cultures, and the disposition to contribute to continuous improvement rather than individual task completion.

Persona 1: Design Project Lead

Phase: Design.

Description: Architect or lead designer who balances client requirements with the physical and logistical constraints of the factory, including shipping widths, crane capacities, and standardised grid systems.

Skill set:

Table III.2 Design Project Lead skill set

Technical skills	Interpersonal skills
DfMA (Design for Manufacturing and Assembly) principles applied to specific building typologies.	Willingness to relinquish late-stage design flexibility in favour of early design freeze.
Understanding manufacturing constraints: maximum shipping envelopes, crane and installation equipment capacities, standardised structural grids, panel size limits, and volumetric stacking tolerances as applicable to the MMC product type.	Ability to communicate manufacturing constraints clearly to clients without sacrificing the design narrative.
Knowledge of panel, volumetric, and hybrid MMC structural systems and their material properties.	Cross-disciplinary collaboration with engineers, factory team, and logistics managers from project inception rather than at documentation stage.
Early-stage coordination of BIM models across consultants.	Systems thinking by understanding how a design decision made in early schematic has downstream production consequences.
Coordination of BIM Execution Plans for MMC projects.	Change management skills to guide clients and stakeholders through the non-negotiable milestones of MMC procurement.
Proficiency in BIM authoring tools (Revit, ArchiCAD, or equivalent) and clash detection workflows.	
Australian Building Code (NCC) provisions for MMC, including panelised, volumetric, and hybrid MMC product types.	
Understanding of design freeze as a non-negotiable programme milestone, including what decisions must be resolved before manufacturing commences, and how late changes cascade through production, logistics, and installation.	

Persona 2: Client/Developer

Phase: Design.

Description: The client or developer-side representative who understands what MMC can and cannot deliver, managing expectations around design lock-in dates, lead times, and product-type constraints (panelised, volumetric, or hybrid) to prevent late design changes cascading through the production system.

Skill set:

Table III.3 Client/Developer skill set

Technical skills	Interpersonal skills
Foundational understanding of MMC systems: volumetric, panelised, and hybrid typologies, including their respective design lock-in requirements and non-negotiable production constraints.	Confidence to hold design freeze dates against client pressure for late changes, backed by a clear explanation of the cascading cost and programme consequences.
Programme literacy: ability to read and interpret an integrated design-manufacture-assemble programme, including milestone dependencies between design freeze, factory start, and site readiness.	Translator between the client's aspirations and the factory's non-negotiable parameters.
Procurement pathway knowledge: MMC contracts differ significantly from traditional D&C or construct-only agreements, particularly regarding risk transfer, payment milestones tied to factory production, and variation management.	Risk communication: articulating the difference between variations that might require schedule disruption or cost penalties.
Awareness of lead times for specialist MMC components and their implications for design development timelines compared to traditional construction.	Long-term relationship management with developers who may deliver multiple MMC projects, including capturing lessons from each project to improve briefing, expectation-setting, and decision-making in subsequent procurements.
Familiarity with the cost structure of MMC: where value is generated (volume, repetition, quality control) and where cost risk sits (late changes, bespoke elements, site interface complexity.	Comfort with uncertainty in an emerging market. The Australian MMC sector is still developing standard contracts, approval pathways, and industry norms, requiring adaptability and pragmatic problem-solving.
Basic building regulatory knowledge sufficient to understand how approval pathways differ for MMC projects.	

Persona 3: Head of Product

Phase: Manufacturing.

Description: The Head of Product is a grey-collar role that sits at the intersection of design and manufacturing. It is filled from two directions: a tradesperson (typically a carpenter or steel framer) who acquires CAD/BIM and design literacy, or a design or engineering graduate (architecture, construction management, or structural engineering) who gains deep hands-on manufacturing and fabrication knowledge. In either case, the role demands simultaneous fluency in both skill sets, producing millimetre-accurate shop drawings, designing jigs and tooling for repetitive factory assembly, and translating between the language of design intent and the realities of physical production. The Head of Product is the person through whom design decisions become producible realities and through whom production constraints are fed back into design.

Skill set:

Table III.4 Head of Product skill set

Technical skills	Interpersonal skills
CAD/BIM software proficiency to millimetre-accurate tolerances (AutoCAD, Revit, SolidWorks, or equivalent).	Bridging communication between white-collar designers and blue-collar factory workers. This applies regardless of which direction the person entered the role from.
Production of shop drawings, connection schedules, and fabrication packages directly from design models.	Translating abstract design documentation into practical and repeatable production instructions an operator or multi-skilled labourer can follow without trade-specific interpretation.
Jig, fixture, and tooling design for repetitive and station-based factory assembly.	Mentoring factory workers in reading digital documentation including tablets, cloud-based drawings, and work instruction systems.
Material knowledge specific to the product type.	Ownership of the product's dimensional integrity across the full production run, not just individual components.
Australian Standards relevant to prefabricated construction.	Proactive identification of design-for-buildability issues before they enter the production line, requiring confidence to escalate concerns to design professionals.
BIM-to-fabrication workflows: CNC file preparation, automated cutting lists, and digital work instruction.	Continuous improvement orientation: capturing production lessons and translating them back into better shop drawing standards and jig configurations.
Quality control checkpoints: defining dimensional tolerances and inspection criteria at each production stage.	Comfort operating in the space between two professional cultures, neither purely a designer nor purely a tradesperson, and professionally secure enough in that hybrid identity to lead effectively.
Assembly sequencing knowledge to ensure shop drawings reflect the logical order of factory construction.	
For those entering from architecture or engineering: practical understanding of how design decisions translate into physical assembly steps, material behaviour under factory conditions, and the constraints of jig-based repetitive production.	
For those entering from a trade background: design principles sufficient to read, interrogate, and where necessary adapt design documentation, and digital fluency to operate BIM authoring tools at a coordination level.	

Persona 4: Production Planner

Phase: Manufacturing.

Description: The operational lead responsible for translating the factory's manufacturing pipeline into a viable and sequenced production programme. Working from lean manufacturing principles, the role manages the flow of materials, labour, and work-in-progress across the factory floor to meet Takt time targets and sustain throughput without accumulating bottlenecks or buffer stock.

Skill set:

Table III.5 Production Planner skill set

Technical skills	Interpersonal skills
Lean manufacturing principles: Takt time calculation, value stream mapping, pull scheduling, and waste identification (the 8 wastes of Lean).	Analytical thinking to diagnose production flow problems before they become schedule failures.
Production scheduling software: factory management platforms, or equivalent tools.	Rapid and clear communication of schedule changes to supervisors and labourers without creating floor-level anxiety.
Materials Requirements Planning (MRP): aligning inbound supply with station-level demand.	Process orientation over task orientation: always thinking about flow and system throughput, not just individual station completion.
Factory layout optimisation: understanding how station sequencing affects throughput and Work In Progress (WIP).	Data-driven decision-making, using production metrics rather than intuition.
Key Performance Indicator development and tracking: throughput rate, cycle time, and on-time delivery.	
Production scenario modelling: identifying bottlenecks and simulating the impact of schedule changes or disruptions.	

Persona 5: Estimator

Phase: Manufacturing.

Description: Prepares component-level cost plans and production-rate-based pricing for MMC projects, requiring a different level of detail and logic from traditional construction estimating. This includes fastener counts, station productivity rates, and factory labour hours per unit of production.

Skill set:

Table III.6 Estimator skill set

Technical skills	Interpersonal skills
Component-level quantity surveying: producing Bills of Quantities at the level of precision MMC manufacturing requires including number of fasteners and fixings, linear metres of framing track, sheet counts, and panel or pod unit counts—rather than the elemental or trade-package level used in traditional construction.	Ability to communicate the logic of component-level pricing to clients and developers unfamiliar with manufacturing cost structures, particularly the shift from 'trade rates' to 'production rates'.
Factory productivity rates and labour hour modelling: understanding station-level output rates (units per shift, panels per day) and how these translate into cost per square metre or cost per unit of production.	Confidence to defend highly detailed and granular estimates.
Material waste factors specific to controlled manufacturing environments, which differ significantly from on-site construction waste assumptions.	Collaborative relationship with the Production Planner and Head of Product: estimates must reflect actual factory capabilities and productivity, not theoretical benchmarks from traditional construction databases.
Understanding of fixed and variable cost structures in a factory: distinguishing overhead costs of running the factory (tooling, equipment depreciation, facility costs) from direct production costs that vary with volume.	Analytical rigour: MMC estimating errors compound through volume production in a way that on-site estimating errors do not. This is because a miscounted fastener rate or incorrect productivity assumption multiplies across every panel in the run.
BIM and model-based estimating: extracting quantities directly from federated models and shop drawings rather than manually measuring from 2D documentation.	Commercial awareness of where MMC delivers cost value (repetition, quality control, reduced on-site preliminaries) and where it carries cost risk (design change penalties, transport, installation complexity at the site interface).
Knowledge of MMC product types—panelised, volumetric, hybrid—and how the cost structure, pricing logic, and risk profile differ between them.	Willingness to develop and maintain MMC-specific cost databases built from actual production data, rather than relying on industry benchmarks calibrated to traditional construction methods.
Understanding of the design freeze requirement and its pricing implications: late client variations carry significantly higher cost penalties in MMC than in traditional construction, and the estimator must quantify and communicate this risk.	

Persona 6: Supply Chain and Procurement Specialist

Phase: Manufacturing.

Description: Manages the inbound flow of materials and components required to sustain uninterrupted and Takt-time production. This requires maintaining supplier relationships capable of meeting dimensional tolerance requirements and delivery schedules, managing lead times for specialist and internationally sourced components, and coordinating inbound supply rhythms with the Production Planner to prevent floor-level disruption.

Skill set:

Table III.7 Supply Chain and Procurement Specialist skill set

Technical skills	Interpersonal skills
Procurement of both raw materials and standardised components aligned with factory production rhythms—raw materials include structural timber, steel coil, sheet materials, concrete, and insulation boards; components include structural connectors, engineered timber products, facade systems, services components, and fixings sourced as finished or semi-finished inputs.	Strategic thinking about supply risk, e.g., single-source dependency is a common vulnerability in Australia’s emerging MMC supply ecosystem.
Supplier evaluation, qualification, and ongoing performance management for precision-manufactured inputs, including dimensional tolerance compliance and delivery reliability.	Collaborative forward-planning with the Production Planner to synchronise delivery schedules with factory floor demand rather than managing supply reactively or in isolation.
Understanding of lead times for specialist MMC components, including internationally sourced items, and how these must be considered into the production schedule.	Commercial negotiation balanced against the need for long-term, reliable supplier relationships.
Contract management for supply agreements.	Proactive communication when supply disruptions threaten the production schedule, with proposed solutions presented simultaneously with the problem notice.
Bill of Materials (BOM) literacy: understanding what components each MMC product type requires, at which station they are consumed, and what buffer stock is acceptable without disrupting factory floor organisation.	Systems thinking: understanding that a component delivery failure often had a delayed impact, remaining invisible until the downstream process relies on that specific input.
Awareness of Australia’s import dependency for many MMC components and the supply chain risk this creates in a growing domestic market.	Cultural shift from traditional construction procurement: resisting the instinct to carry large buffer stocks and instead building supplier relationships capable of supporting JIT delivery reliably.
Understanding of diverse production strategies from ‘make to stock’ to ‘make-to-order’.	

Persona 7: Supervisor, Production

Phase: Manufacturing.

Description: The production-line manager focused on real-time Quality Assurance and safety, ensuring operators follow Standard Operating Procedures at every station.

Skill set:

Table III 8 Supervisor skill set

Technical skills	Interpersonal skills
Deep station-by-station knowledge of Standard Operating Procedures (SOPs) for the full production sequence.	Authoritative but approachable leadership on the production floor.
Quality assurance documentation: non-conformance reports (NCRs).	Real-time corrective feedback delivery: redirecting a worker's technique in the moment without disrupting production pace.
Reading and interpreting shop drawings and construction documents to verify works against specification.	Consistent standards enforcement without exception-making.
Measurement and inspection tools: laser levels, digital callipers, moisture meters, etc.	Coaching mindset to build capabilities in operators rotating between stations.
Digital literacy sufficient to operate tablet-based QA platforms, cloud-based inspection records, and photographic evidence systems.	Meticulous documentation, regulatory compliance, and the certifier's digital evidence package.
Defect classification, severity assessment, and escalation protocols.	Situational awareness to detect emerging quality or safety issues before they become defects or incidents.

Persona 8: Operator, Production

Phase: Manufacturing.

Description: The multi-skilled operative who works across various factory stations; for example framing, cladding, services rough-in, finishing; requiring a broader and more flexible skill set than a traditional siloed trade.

Skill set:

Table III.9 Operator skill set

Technical skills	Interpersonal skills
Multi-station skill: framing, wall cladding, insulation installation, services rough-in, waterproofing, and finishing as applicable to the product type.	Comfort with repetitive and process-driven work.
Ability to read basic shop drawings, work instructions, and digital Standard Operating Procedures (SOPs).	Willingness to follow SOPs precisely and raise deviations through formal channels.
Correct use of power and hand tools appropriate to each station: nail guns, screw guns, cutting tools, and lifting aids.	Openness to rotating between stations, requiring flexibility in work requirements.
Understanding of quality checkpoints at each station: what to measure, how to measure it, and what constitutes a non-conformance.	Ability to raise quality concerns constructively through non-conformance reporting systems.
Basic digital literacy: accessing Standard Operating Procedures (SOPs), recording completion data, and photographing and flagging non-conformances through digital platforms.	Teamwork orientation in a production-line context where one station's output directly constrains the next station's input.
Familiarity with repetitive precision assembly: understanding that deviation from the Standard Operating Procedures (SOPs) is a non-conformance.	
WHS awareness specific to factory environments: housekeeping, machine proximity zones, manual handling techniques, and PPE requirements.	

Persona 9: Logistics Manager

Phase: Manufacturing.

Description: Coordinates the outbound dispatch of MMC elements and products, managing transport permits, oversized load movements, and Just-in-Sequence/Just-in-Time delivery to site.

Skill set:

Table III.10 Logistics Manager skill set

Technical skills	Interpersonal skills
Heavy haulage and oversized load permitting processes across Australian state and territory jurisdictions.	Forward-planning and sequencing ability.
Just-in-Sequence (JIS) and Just-in-Time (JIT) delivery scheduling aligned with site installation sequencing and lifting or handling equipment availability.	Calm, solution-focused communication when delays occur at either the factory or site end.
Understanding of logistics requirements per MMC product type.	Relationship management across multiple parties: transport companies, state road authorities, the contractor's site team, and the factory's production planning team.
Use of logistics coordination and project management software to synchronise factory production schedules with site requests.	Rapid decision-making when real-time disruptions require sequence changes.
Working knowledge of load weights, lift radius, and site access constraints sufficient to incorporate installation equipment requirements into transport planning and brief relevant parties accurately.	Strong documentation discipline for permit compliance, insurance requirements, and contractual chain-of-custody records.
MMC element and component storage risk assessment; e.g., implications of holding panels, frames, pods, or volumetric units when site is not ready (structural, weather, and cash-flow consequences differ by product type).	Systems orientation: Understanding that system dependencies can mask immediate errors.
Traffic management coordination with local councils and state road authorities for transport corridor approvals.	

Persona 10: Project Manager

Phase: Manufacturing.

Description: The manufacturer's delivery lead, responsible for managing the end-to-end project from the factory side across design resolution, production, logistics, and on-site installation. The role holds the factory production programme and the site programme in productive tension, requiring programme literacy, contract management capability, and the confidence to enforce design freeze and surface risks before they become crises.

Skill set:

Table III.11 Project Manager skill set

Technical skills	Interpersonal skills
Integrated programme management across design freeze, factory production, logistics, and site installation, understanding the dependencies and critical path specific to MMC delivery.	Systems thinking at the programme level: the ability to see the full factory-to-building sequence as an integrated manufacturing and assembly system, and to identify where decisions in one phase create constraints or opportunities in another.
Contract management for MMC-specific agreements: payment milestones tied to factory production stages, variation management protocols that reflect design freeze requirements, and liability frameworks for the factory-to-site interface.	Confident leadership across two organisational cultures (i.e., factory and construction site) which operate with different rhythms, languages, and professional norms.
Risk identification and management across the full MMC delivery chain: design change risk, production risk, transport risk, site readiness risk, and interface risk between manufactured elements and site-constructed work.	Proactive client communication: in MMC, surprises are far more costly than in traditional construction because of production interdependencies; the Project Manager's job is to surface issues early and present options.
Cost control against factory-based cost structures: monitoring production efficiency, material costs, logistics costs, and on-site installation costs.	Change management: guiding clients, designers, and contractors through the discipline of MMC procurement, particularly the non-negotiable nature of design freeze and the consequential cost of late variations.
Client and contractor relationship management: translating factory programme status, production constraints, and delivery sequencing into language that the client, developer, and main contractor can act on.	Commercial awareness to balance the manufacturer's production economics against the client's project objectives, identifying where flexibility and customisation is genuinely possible and where it is not.
Quality management: overseeing the integrated QA system from factory inspection through to as-installed sign-off, ensuring the certifier's evidence requirements are met at every stage.	Conflict resolution at the factory-site interface: when tolerances, sequences, or programme assumptions diverge between the factory team and the site team, the Project Manager is the first resolution point.
Understanding of Australian building regulations, planning approvals, and certification pathways as they apply to prefabricated construction.	

Persona 11: Assembly Integrator

Phase: Assembly/Installation

Description: The on-site precision specialist who leads product installation, managing the critical connection points where factory products meet site works and each other.

Skill set:

Table III.12 Assembly Integrator skill set

Technical skills	Interpersonal skills
Precision surveying and setting-out to sub-millimetre tolerances: total station operation, digital levels, and 3D scanning.	Precision-first mindset: raplacing traditional site tolerances with manufacturing-grade accuracy to ensure seamless unit-to-unit integration.
Reading and interpreting structural connection drawings, MMC element interface documentation, and tolerance schedules specific to the MMC product type being installed.	Ability to de-escalate tension when site conditions deviate from factory assumptions and a time-pressured engineering solution must be found on the spot.
Installation equipment knowledge appropriate to the MMC product type: crane lift supervision and rigging for volumetric and large panel systems; mechanical handling and bracing systems for lighter panelised and frame products.	Clear and simultaneous communication with the crane operator, structural engineer, factory liaison, and site supervisor.
Expertise in wet and dry connection systems for MMC, including structural interfaces between volumetric units, panels, and in-situ foundations or site-built components.	Leadership under time and cost pressure: installation equipment costs, whether crane hire for volumetric systems or specialised handling for panelised products, make delays extremely expensive, but rushing connection integrity is never an option.
Building envelope weatherproofing and sealing systems at MMC element joints (e.g., panel-to-panel, unit-to-unit, and element-to-slab interfaces) with an understanding that sealing requirements differ significantly across product types.	Meticulous as-installed data integrity by capturing real-time digital evidence, providing certifiers with the granular verification required for off-site and compliance.
Engineering strategies to manage variation at the interface between manufactured precision and site-constructed variability.	Collaborative relationship with the factory team to understand production-phase deviations that may affect installation tolerances before the MMC products arrive on site.
Digital documentation of as-installed conditions: photographic records, dimensional deviation logs, and digital handover packages for the certifier.	
AS/NZS structural connection standards and their application across MMC installation types. Panelised, volumetric, hybrid, and cross-laminated timber systems each carry distinct connection requirements.	

Persona 12: Compliance Inspector/Technical Certifier

Phase: Assembly.

Description: The independent compliance function responsible for verifying quality of 'hidden works' via digital evidence before MMC elements are closed up and delivered to site. This persona is fulfilled by different licence holders depending on the scope of work: building certifiers for structural and envelope compliance; licensed electricians operating as independent consultants for electrical rough-in inspection; and licensed plumbers for hydraulic and drainage inspection, all working within an MMC digital evidence framework rather than traditional physical inspection regimes.

Skill set:

Table III 13 Compliance Inspector/Technical Certifier skill set

Technical skills	Interpersonal skills
National Construction Code (NCC) and relevant state building regulations as applied to prefabricated construction across MMC typologies; panelised, volumetric, hybrid, and cross-laminated timber systems.	Professional confidence in approving work that cannot be physically inspected in the traditional sense. A renegotiation of what constitutes adequate evidence, applicable equally to building certifiers, electricians, and plumbers operating in this context
Inspection regimes for hidden works that will be permanently enclosed before site delivery, including: structural connections, insulation, and weatherproofing membranes (building certifier scope); electrical rough-in, cable routing, and switchboard installation (licensed electrician scope); hydraulic pipework, drainage, and wet area waterproofing (licensed plumber scope).	Ability to develop and communicate clear, achievable digital evidence standards with factory teams before production starts, particularly for electrical and hydraulic inspectors whose traditional inspection practice is entirely on-site and physical.
Assessment of digital evidence against physical inspection: photographic records, thermal imaging, point-cloud scans, sensor data, and time-stamped production logs; and the ability to define what constitutes adequate digital evidence for each category of hidden work.	Collaborative relationship with factory QA teams: co-developing evidence-gathering protocols that satisfy regulatory requirements without creating impractical documentation burdens at the production stage.
Australian building approval pathways for off-site manufactured elements, including state-specific variations in how private and council certification operate for prefabricated buildings across different MMC product types.	Cross-disciplinary coordination where building, electrical, and hydraulic inspection must be sequenced correctly within the factory production programme. A missed inspection window can require destructive opening of completed panels.
Fire, acoustic, and structural performance requirements embedded in MMC systems (building certifier); electrical load calculations, circuit protection, and AS/NZS 3000 Wiring Rules compliance in factory-installed electrical systems (electrician); hydraulic design compliance with AS/NZS 3500 and state-specific plumbing codes for factory-installed pipework (plumber).	Willingness to engage proactively with evolving regulatory frameworks rather than defaulting conservatively to traditional inspection methods incompatible with the MMC process.
Familiarity with emerging regulatory frameworks for remote and digital inspection, including third-party digital evidence management platforms and the legal standing of digital sign-off under state building legislation.	Clear written communication: regulatory determinations must be defensible, documented, and comprehensible to building owners, builders, and future auditors regardless of which licence category the inspector holds.

info@building40crc.org
www.building4pointzero.org
/building-4-0-crc