



LEADING AUSTRALIAN BUSINESS

FAIR WORK AUSTRALIA

2010 Annual Wage Review

ACCI POST BUDGET SUBMISSION

May 2010

LEADING AUSTRALIAN BUSINESS

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1. INTRODUCTION

1. ACCI is pleased to provide this brief post-budget submission to Fair Work Australia in relation to the 2010 Annual Wage Review. It should be read in conjunction with ACCI's primary and reply written submissions.
2. These submissions are without prejudice to ACCI or ACCI members' further consideration of these matters. ACCI members may in particular address Fair Work Australia regarding the impact of any determination from the Annual Wage Review on an industry basis.

2. OVERVIEW 2010-11 BUDGET

3. The release of the *2010-11 Budget* provides an update of the government's key macroeconomic forecasts. In addition, it announces changes to the tax and transfer system that will have an important bearing on the incomes of the low paid. The upgrade to the government's economic forecasts as outlined in the *2010-11 Budget*, reflect the performance of the economy since the last mid-year update (MYEFO). These forecasts also highlight an important new risk to growth stemming from European sovereign debt markets that Fair Work Australia should take into consideration in its assessment of the state of the economy. Importantly for the low-paid, the budget delivered the promised further increase in the low-income tax offset which will provide a significant increase in after-tax income.

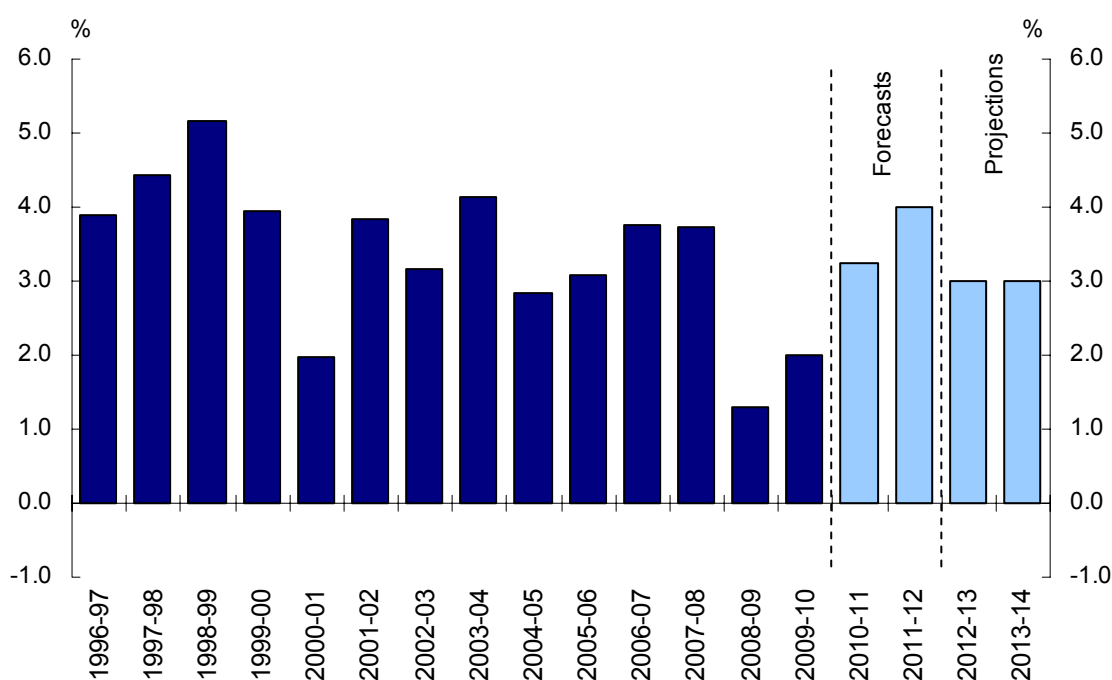
2.1 UPDATED ECONOMIC FORECASTS

4. Treasury has provided updated economic forecasts with the release of the *2010-11 Budget*. These forecasts revise the economic outlook for the 2010-11 financial year published in the *2009-10 Mid-Year Economic and Fiscal Outlook* (MYEFO) and provide the first set of detailed forecasts for the 2011-12 financial year. On the whole, the revisions to the government's economic forecasts were largely unsurprising given the better than expected performance of the economy since the MYEFO was released in November 2009. The outlook for economic growth has been revised upwards modestly, the unemployment rate is expected to slowly trend lower and inflation is forecast to level at 2 ½ per cent throughout the forward estimates period.
5. The *2010-11 Budget* upgrades forecast economic growth in the near-term while downgrading expectations for the final year of the forward estimates period. Growth in the current 2009-10 financial year, for which we already have six months of data, is estimated at 2 per cent. This represents a half a percentage point improvement on the MYEFO forecast of 1 ½ per cent

growth. The pace of economic growth is expected to strengthen in 2010-11, forecast at 3 ¼ per cent, which again represents a half a percentage point upgrade to the forecasts presented at MYEFO.

6. Economic growth is expected to reach 4 per cent in 2011-12, unchanged relative to the projection at MYEFO. Detailed economic forecasts for the 2011-12 financial year were presented for the first time and they show growth being led by private sector business investment, which contributes more than half of all growth in that period. However, the outlook for growth in 2012-13 is less optimistic, revised down 1 percentage point to 3 percent with economic growth expected to continue at this slower pace in 2013-14.

Treasury Real GDP Growth Forecast

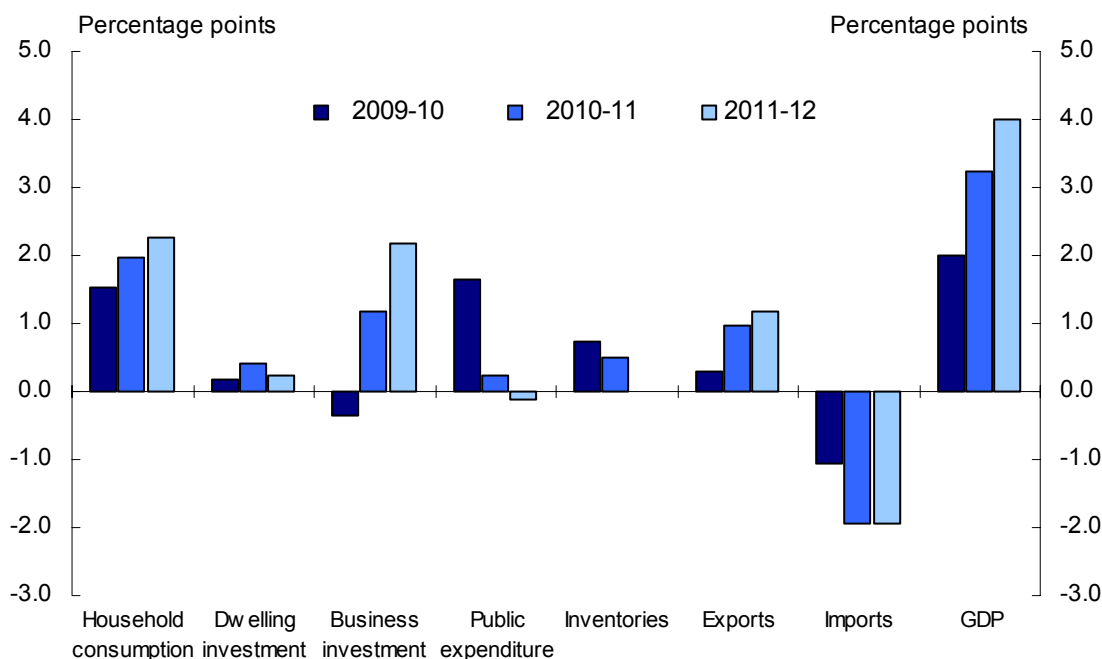


Source: Budget 2010-11

7. Treasury's detailed economic forecasts for the 2010-11 financial year show the composition of growth shifting markedly. Public sector activity will make a less significant contribution to growth in 2010-11 relative to 2009-10, as the government's temporary fiscal stimulus measures unwind. In contrast, after declining by 2 per cent in 2009-10, business investment is forecast to commence a greater contribution to an uneven recovery in 2010-11, growing by +7 per cent with the mining sector leading the upswing in activity.
8. Increasingly, the Australian economy is expected to experience a two-speed recovery in which mining sector investment and activity surges ahead, while the performance of much of rest of the economy is far more subdued. ACCI noted this expectation and its importance in both our original and reply submissions. Fair Work Australia in assessing the likely strength of the

economy and its implications for the job prospects of the low-paid will need to take the nature of the recovery into consideration. For the most part, the low-paid and award-reliant workers do not work in those areas of the economy that will benefit most from the expected boom in minerals resources investment. The detail of Treasury's updated forecasts provide further support for view that a two-speed economy is emerging.

Forecast Composition of Real GDP Growth



Source: Budget 2010-11

- The outlook for business investment is fundamental in relation to this issue. Following a mild contraction in 2009-10, total business investment in 2010-11 is expected to expand by 7 per cent and contribute more than a third of the 3 ¼ per cent growth forecast in that year. The upswing is expected to strengthen in 2011-12, with business investment forecast to grow by 12 ½ per cent, adding 2.2 percentage points to total growth of 4 per cent. While an explicit breakdown of business investment by sector is not provided in Treasury's forecasts, the surrounding discussion does make clear that mining sector investment will be the key driver of the recovery.

New business investment is expected to recover strongly over the forecast period, led by an expected surge in mining investment. New business investment is forecast to grow by 7 per cent in 2010-11, and by 12½ per cent in 2011-12. This is expected to see total business investment approach its recent highs as a proportion of GDP. The recovery in business investment is expected to be driven by investment in machinery and equipment, and engineering

construction, while non-residential building investment is expected to remain subdued.¹

10. In further discussion of the outlook for business investment, and engineering construction in particular, Treasury note that:

Investment in new engineering construction is also expected to grow strongly over the forecast horizon as a number of major resource projects commence. Recent data indicate particular strength in investment intentions for 2010-11 in the mining sector. Mining-related investment is expected to drive investment in engineering construction, with extremely robust growth of 19 per cent forecast in 2010-11 and 20½ per cent in 2011-12. With strong growth expected in the LNG sector, and further major resource projects in the pipeline, engineering construction investment is expected to continue to grow significantly as a share of total business investment over coming years.²

11. The difference in comparison to the outlook for the non-residential building element of business investment is stark:

Investment in new non-residential building, by contrast, is expected to remain subdued. Outside of stimulus-related activity, there is a limited pipeline of work in the building sector, reflecting credit constraints, high vacancy rates and soft property prices. Despite support from the Government's Building the Education Revolution program, investment in this sector has fallen sharply over the past year.³

12. To a large extent, these divergent expectations for engineering construction and non-residential building activity reflect the emergence of the "two-speed economy". While mining sector investment will contribute strongly to total business private sector business investment, it is implicit in Treasury's forecast that capital expenditure in other sectors of the economy will not grow as rapidly. In turn this will have important implications for aggregate labour in the workforce that Fair Work Australia will need to take into consideration.

13. The commentary accompanying the updated economic forecasts also includes an analysis of the estimated contribution of the government's fiscal stimulus measures to economic growth in 2009. These numbers are consistent with those presented in ACCI's original submission, which were taken from a speech by Treasurer Swan. Treasury estimate that discretionary fiscal stimulus measures added 2.1 percentage points to total growth of 1.4 per cent in calendar year growth for 2009.

¹ Treasury, *Budget Paper No. 1, Budget Strategy and Outlook 2010-11: Economic Outlook*, page 18.

² *Ibid*, page 19.

³ *Ibid*, page 20.

The Australian economy slowed significantly during the global downturn, but weathered the crisis better than most other advanced economies, supported by timely and substantial policy stimulus. The economy grew by 1.4 per cent during 2009 — a full 4½ percentage points above the advanced economy average. Without fiscal stimulus, it is estimated that the economy would have contracted by 0.7 per cent in 2009.⁴

TREASURY, DOMESTIC ECONOMY FORECASTS

	Outcomes	Estimate	Forecasts	
	2008-09	2009-10	2010-11	2011-12
Demand and Output				
Household consumption	1.9	2 3/4	3 1/2	4
Dwellings	-1.9	3	7 1/2	4
Business Investment	6.6	-2	7	12 1/2
Private Final Demand	2.3	1 3/4	4 1/2	6
Public Final Demand	4.3	7 1/4	1	- 1/2
Domestic Final Demand	2.7	3	3 3/4	4 1/2
Change in Inventories (a)	-0.9	3/4	1/2	0
Exports	0.1	1 1/2	5	6
Imports	-2.8	5	9	8 1/2
Net Exports (a)	0.6	- 3/4	-1	- 3/4
Real GDP	1.3	2	3 1/4	4
Non-farm	1.0	2	3 1/2	4
Farm Product	17.6	6	1	2
Other Selected Measures				
Terms of trade	9.6	-3 3/4	14 1/4	-3 3/4
Employment (b)	0.1	2 1/2	2 1/4	2
Unemployment Rate (c)	5.7	5 1/4	5	4 3/4
Consumer Price Index (b)	1.5	3 1/4	2 1/2	2 1/2
Wage Price Index (b)	3.8	2 3/4	3 3/4	4

(a) contribution to growth

(b) year-end June quarter

(c) estimate for June quarter

14. While economic growth in 2009 was heavily dependent on fiscal stimulus, the unwinding of those measures will detract from activity in the years ahead.

The stimulus is now being steadily withdrawn and is expected to detract from economic growth from the March quarter 2010, and into 2010-11 and 2011-12. The stimulus will detract around 1 percentage point from GDP growth over 2010 and ¾ of a percentage point over 2011.⁵

15. The detailed economic forecasts show public final demand grew strongly in 2009-10, increasing by +7 ¼ per cent as a result of the government's various stimulus measures but will slow dramatically in 2010-11 to just 1 per cent before contracting by - ½ per cent in 2011-12.

⁴ *Ibid*, page 3.

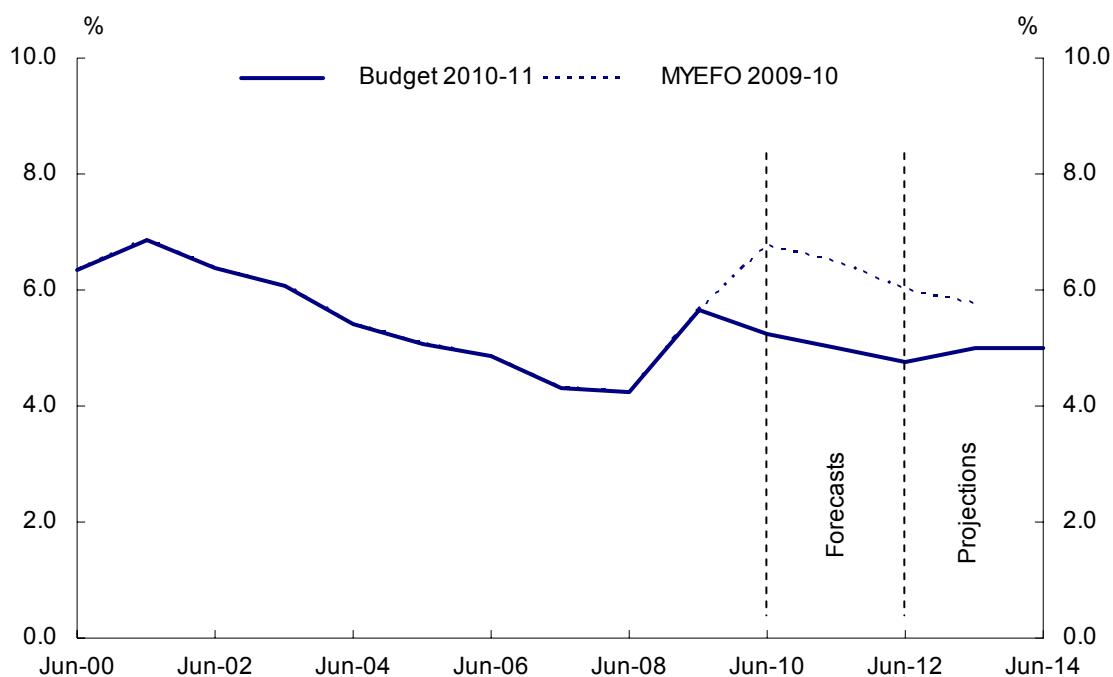
⁵ *Ibid*, page 22.

16. Household consumption is expected to record modest growth of 2 ¾ per cent in 2009-10 but is forecast to strengthen in 2010-11 and 2011-12, to grow by 3 ½ and 4 per cent, respectively. Continued robust employment growth, rising wages, resilient confidence and a recovery in household wealth are all seen as being supportive of the outlook for consumption.
17. The nascent recovery in dwelling investment is expected to continue. After growing by 3 per cent in 2009-10, dwelling investment is forecast to expand a further 7 ½ per cent in the 2010-11 financial year due in large part to strong population growth and rising incomes. Higher interest rates, however, are expected to be a moderating influence on the level of new housing construction.
18. Stronger business investment and firmer household consumption are forecast to see imports rise over 2010-11 and 2011-12. While there will be a partially offsetting increase in exports, the growth in imports will see net exports detracting considerably from growth through the 2009-10 to 2011-12 period. However, the current account deficit will narrow in 2010-11 to 3 ¾ per cent of GDP as result of a surge in the terms of trade to a 60-year high before widening to 5 per cent of GDP in 2011-12.
19. Labour market conditions are expected to continue to improve, albeit at a more subdued pace. Employment growth is estimated at 2 ½ per cent through the year to the June quarter 2010 and will ease slightly to 2 ¼ per cent over the twelve months to the June quarter 2011. The year-end pace of job creation will slow further, but remain solid at 2 per cent in the June quarter of 2012. Treasury's forecasts note that the degree of the downturn in hours worked across the economy will moderate the extent to which increasing demand for labour will translate to employment growth.

Ongoing strength in labour demand will also be met through an adjustment in workers' average hours. During the slowdown businesses generally reduced workers' average hours rather than shedding jobs. As the labour market has recovered, businesses have increased workers' average hours and this is expected to continue, with average hours returning to more normal levels over the course of 2010-11.⁶
20. The unemployment rate currently stands at 5.4 per cent in April 2010. Treasury forecast the unemployment rate will only improve marginally from this point. Relative to MYEFO there has been a significant downward revision to the expected peak in the unemployment rate from 6 ¾ per cent in the June quarter of 2010 to an earlier 5 ¾ per cent peak which has already passed in the June quarter of 2009.

⁶ *Ibid*, page 31.

Forecast Unemployment Rate



Source: Budget 2010-11

21. The earlier and lower peak in the unemployment rate is welcome, but Treasury expect little further improvement beyond the current 5.4 per cent level. The unemployment rate is seen declining to 5 ¼ per cent in the June quarter of 2010 before eventually reaching 4 ¾ per cent in the June quarter of 2012, a level that is reported to be consistent with full employment. In total that represents slightly less than a ¾ percentage point decline in the unemployment rate from its present level. Treasury expect strong labour force growth and a rise in the participation rate will moderate the pace of any further decline in the unemployment rate:

However, the decline in the unemployment rate is expected to be slower than seen in recent quarters as the labour force rapidly expands. This forecast reflects an expectation that the working-age population will continue to grow strongly and that the participation rate will trend up over the forecast period, reaching 65½ per cent in the June quarter 2011.⁷

22. Wages growth is expected to pick up in line with the improvement in labour market conditions. Over the twelve months to the June quarter 2010 the year-end pace of wage inflation is forecast at 2 ¾ per cent and is expected to accelerate to 3 ¾ per cent in the June quarter of 2011 and reach 4 per cent by the June quarter of 2012. Treasury consider that there are upside risks to

⁷ *Ibid*, page 31.

wages growth in “industries and regions associated with the resources sector”⁸.

23. Treasury forecast a relatively benign outlook for inflation, which may be on the optimistic side. Year-end inflation is estimated at 3 ¼ per cent in the June quarter of 2010 but is expected to slow markedly and remain at 2 ½ per cent throughout the entirety of the forward estimates period. The appreciation of the exchange rate over the past twelve months, easing labour costs and spare capacity in the economy are forecast by Treasury to contribute to a moderation in inflation in the near-term. In the remainder of the forecast horizon, inflation is expected to stabilise at 2 ½ per cent, in the middle of the Reserve Bank’s 2 to 3 per cent target range.

2.2 SOVEREIGN DEBT MARKET RISKS TO GROWTH

24. Developments in sovereign debt markets in Europe in recent weeks demonstrate they remain a significant risk to the global economic recovery. ACCI highlighted the issue in its reply submission and noted the IMF’s assessment in April that concerns about the solvency of the Greek government could transform into “a full-blown and contagious sovereign debt crisis”⁹. Following scenes of rioting in Greece on May 6, in protest at proposed fiscal austerity measures, global stocks markets sold off sharply on fears that the Greek government would default on its debts and potentially trigger a second financial crisis.
25. The strains in global financial markets were so severe they prompted the announcement of a new *European Financial Stabilisation* mechanism worth up to €500 billion on May 9 to support market confidence. While sovereign debt markets appear to have stabilised in response to these measures, the threat they pose to the tentative global economic recovery in the medium to longer-term still lingers and must be taken into consideration by Fair Work Australia.
26. Treasury’s updated economic forecasts highlight a sovereign debt market crisis as a key risk to the outlook for the world economy.

The potential for the sovereign debt crisis in Greece to spread to other countries and seriously impact broader financial markets is a significant risk for the world economy.¹⁰

27. A sovereign debt market crisis would prompt calls for fiscal policy tightening which would weaken domestic demand at a point in the cycle when the upswing in activity is still not yet firmly established. The loss of confidence in

⁸ *Ibid*, page 34.

⁹ IMF, *World Economic Outlook: Rebalancing Growth*, April 2010, page xiv.

¹⁰ *Ibid*, page 4.

financial markets would also lead to heightened risk aversion amongst investors, tending to undermining business investment.

A significant downside risk is the sustainability of sovereign debt, as the recent events in Greece acutely demonstrate. A loss of market confidence in the sustainability of fiscal positions in any of the major advanced economies would create serious renewed tensions in international financial markets and bring forward calls for more rapid fiscal consolidation at a time when large parts of the global economy are still transitioning to self-sustaining expansion.¹¹

28. As a medium-sized open economy, risks to global growth also pose risks to domestic activity. Treasury's note as much in their updated economic forecasts:

The global economy nevertheless presents risks to the domestic outlook. Advanced economies have to work through an extended period of financial sector balance sheet repair and fiscal consolidation. Concerns about fiscal sustainability have the potential to spill over from the EU periphery to other highly indebted countries and to financial markets more broadly. China faces challenges following the implementation and subsequent withdrawal of stimulus measures, particularly in relation to managing inflation pressures. To date, China has managed these risks successfully. On the upside, there is the potential for the global economy to recover more strongly, with flow-on effects to the Australian economy.¹²

29. ACCI believes Fair Work Australia should take into account these developments in global financial markets and assess their potential impact on expectations for domestic growth. The implications of a second financial crisis for the domestic economy would be profound and potentially even jeopardise the economic recovery. Given the severity of the risk, even if it fails to materialise prior to Fair Work Australia delivering its final decision, it adds to the case for taking a conservative approach to any uprating minimum wages by delivering a genuinely moderate increase as recommended by ACCI in its primary submission.

¹¹ *Ibid*, page 12.

¹² *Ibid*, page 4.

2.3 LOW-INCOME TAX OFFSET INCREASED

30. The *2010-11 Budget* delivered the scheduled \$150 per annum increase in the low-income tax offset, taking its total value to \$1,500 on 1 July 2010. The further increase in the low-income tax offset will add almost \$2.90 to the after-tax incomes of the low paid. The operation of the low-income tax offset leaves low income earners with an effective tax-free threshold of \$16,000 per annum.
31. ACCI believes the increases in the low-income tax offset over recent years have been significant and should be taken into consideration by Fair Work Australia, as recommended by ACCI in its primary submission.

ABOUT ACCI – LEADING AUSTRALIAN BUSINESS

ACCI has been the peak council of Australian business associations for 105 years and traces its heritage back to Australia's first chamber of commerce in 1826.

Our motto is "Leading Australian Business."

We are also the ongoing amalgamation of the nation's leading federal business organisations - Australian Chamber of Commerce, the Associated Chamber of Manufactures of Australia, the Australian Council of Employers Federations and the Confederation of Australian Industry.

Membership of ACCI is made up of the State and Territory Chambers of Commerce and Industry together with the major national industry associations.

Through our membership, ACCI represents over 350,000 businesses nationwide, including over 280,000 enterprises employing less than 20 people, over 55,000 enterprises employing between 20-100 people and the top 100 companies.

Our employer network employs over 4 million people which makes ACCI the largest and most representative business organisation in Australia.

Our Activities

ACCI takes a leading role in representing the views of Australian business to Government.

Our objective is to ensure that the voice of Australian businesses is heard, whether they are one of the top 100 Australian companies or a small sole trader.

Our specific activities include:

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- Representation and advocacy to Governments, parliaments, tribunals and policy makers both domestically and internationally.
 - Business representation on a range of statutory and business boards, committees and other fora.
 - Representing business in national and international fora including Fair Work Australia, Australian Industrial Relations Commission, Safe Work Australia, International Labour Organisation, International Organisation of Employers, International Chamber of Commerce, the Business and Industry Advisory Committee to the Organisation for Economic Co-operation and Development, the Confederation of Asia-Pacific Chambers of Commerce and Industry and the Confederation of Asia-Pacific Employers.
 - Research and policy development on issues concerning Australian business.
 - The publication of leading business surveys and other information products.
 - Providing forums for collective discussion amongst businesses on matters of law and policy affecting commerce and industry.

Publications

A range of publications are available from ACCI, with details of our activities and policies including:

- The ACCI Policy Review; a analysis of major policy issues affecting the Australian economy and business.
- Issue papers commenting on business' views of contemporary policy issues.
- Policies of the Australian Chamber of Commerce and Industry – the annual bound compendium of ACCI's policy platforms.
- The Westpac-ACCI Survey of Industrial Trends - the longest, continuous running private sector survey in Australia. A leading barometer of economic activity and the most important survey of manufacturing industry in Australia.

- The ACCI Survey of Investor Confidence – which gives an analysis of the direction of investment by business in Australia.
- The Commonwealth-ACCI Business Expectations Survey - which aggregates individual surveys by ACCI member organisations and covers firms of all sizes in all States and Territories.
- The ACCI Small Business Survey – which is a survey of small business derived from the Business Expectations Survey data.
- Workplace relations reports and discussion papers, including the ACCI Modern Workplace: Modern Future 2002-2010 Policy Blueprint and the Functioning Federalism and the Case for a National Workplace Relations System and The Economic Case for Workplace Relations Reform Position Papers.
- Occupational health and safety guides and updates, including the National OHS Strategy and the Modern Workplace: Safer Workplace Policy Blueprint.
- Trade reports and discussion papers including the Riding the Chinese Dragon: Opportunities and Challenges for Australia and the World Position Paper.
- Education and training reports and discussion papers including ACCI's Skills for a Nation 2007-2017 Blueprint.
- The ACCI Annual Report providing a summary of major activities and achievements for the previous year.
- The ACCI Taxation Reform Blueprint: A Strategy for the Australian Taxation System 2004–2014.
- The ACCI Manufacturing Sector Position Paper: The Future of Australia's Manufacturing Sector: A Blueprint for Success.

Most of this information, as well as ACCI media releases, parliamentary submissions and reports, is available on our website – www.acci.asn.au.

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