RSLG Report

Southland-Murihiku 2021 | Environmental Scan Highlights

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Co-Chairs' Foreword

Southland Murihiku Regional Skills Leadership Group

***Ka tangi te tītī, ka tangi te kākā, ka tangi hoki ko au, Tihei Mauri Ora!
The Titi is calling, The Kākā is calling and I wish to call, behold for there is life!***

Tēnā koutou katoa

2020 and 2021 has presented our world with much challenge, uncertainty and overwhelm; in this place of vulnerability we have observed great action, collaboration and focus from our Murihiku/Southland region and communities – all striving for the common goal of a thriving Murihiku, today, tomorrow and for our future generations.

To support our region with decision making relevant to our regional labour market challenges and opportunities; the Murihiku Southland iRSLG have progressed 2 key pieces of work that form a foundational picture of our Region – 2 pieces of work that will be made available to our regional partners and stakeholders. We believe these two key succinct documents, are important for regional and national discussion, and to support collective decision making, in our efforts to navigate our challenges and opportunities ahead.

Our first piece of work is the ***Southland Murihiku Report on Workforce Demand – Skills and Personnel***, with the purpose being to provide a foundational picture of the Workforce demand and skills needs across Southland Industry sectors, today and into the future. This report shares the regional voices of over 80 industries and businesses in Southland.

Our second piece of work is this ***2021 Environmental Scan Highlights*** document, which provides us with a snapshot of Murihiku/Southland as a region, highlighting our demographic, our regional profiles and insights into the impact of COVID-19 on our communities and economy.

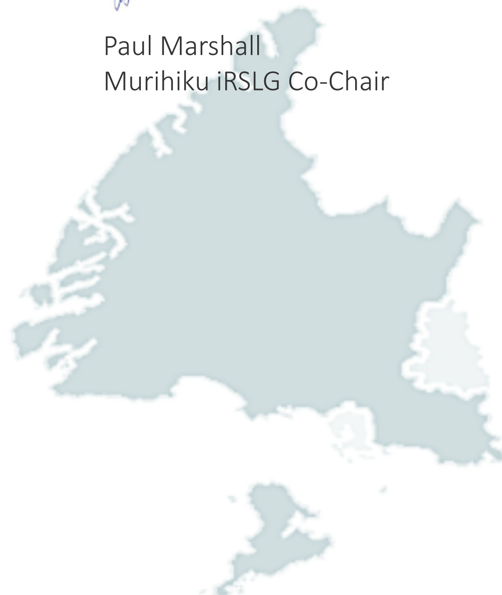
Murihiku/Southland is a region of plenty, a region of great opportunity; and, our people are well known for their steadfastness, resilience and our 'get it done' attitude. We can not emphasise enough, the importance of our region working smarter and in collaboration. Working together makes our regional plight for survival, regeneration and growth; so much more powerful. Iwi, Central and local government, Industry, Business and community, all working collectively, when, and where relevant, is critical at this time. We trust you find this document as a useful resource.

We thank our 2020-2021 iRSLG and Secretariat for their time and effort in establishing a strong foundation for the permanent Murihiku Southland RSLG. We also acknowledge all of the individuals, businesses and organisations that have contributed to the work of iRSLG. Tēnā koutou katoa.

He waka eke noa – We are all in this together

Aimee Kaio
Murihiku iRSLG Co-Chair

Paul Marshall
Murihiku iRSLG Co-Chair



Introduction

Southland Murihiku Regional Skills Leadership Group

Southland Murihiku RSLG Interim Members

Aimee Kaio **(Co-chair)**
Paul Marshall **(Co-chair)**

Graham Budd
Gary Davis
Richard Gray
Stu Hamilton
Anna Huffstutler
Chris Kennett
Richard Kyte
Janette Malcolm
Ceri McLeod
Lisa Shaw
Jason Tibble
Dion Williams

Southern Region Secretariat – MBIE Roles

Southland Murihiku:
Kate Brady – Regional Manager
Toni Biddle - Regional Lead
Vanessa Bellett – Executive Assistant
Ana Bremer – Advisor

Otago:
Fi McKay – Regional Lead
Claes Sandstrom – Senior Advisor

Canterbury:
Jo Aldridge – Regional Lead
Luke Adams – Principal Advisor
Adam Eggleton – Senior Advisor

Southland Murihiku RSLG Permanent Members, August 2021

Tracey Wright-Tawha **(Co-chair)**
Paul Marshall **(Co-chair)**

Anna Huffstutler
Chris Kennett
Ben Lewis
Ceri McLeod
Karen Purdue
Lisa Shaw
Jason Tibble
Amanda Whitaker

The Role of RSLGs

In July 2019, Cabinet approved the establishment of 15 Regional Skills Leadership Groups to identify and support better ways of meeting future skills and workforce needs in New Zealand's regions and cities.

The key deliverable in the first year is a Regional Workforce Plan (RWP), to be developed by the end of June 2022. The RWP will be developed through analysis of local aspirations and future workforce needs, to drive better outcomes for each region's economy and community wellbeing.

Regional Snapshot

Southland Regional Snapshot

Population Summary

Average GDP Per Person
$63k (NZ $61K)

Median Household Income
$81K (NZ $92K)

Annual-average quarterly worker turnover rate
16.8% (NZ 16.3%)

Employment Rate
69.8% (NZ 67.5%)

Unemployment Rate
3.3% (NZ 3.9%)

Under-utilisation Rate
11.3% (NZ 10.2%)

NEET Rate
16.1% (NZ 10.8%)

A snapshot of Southland's population, at 30 June 2020:

102,600
The estimated resident population in Southland

2.0%
The percentage of the total estimated resident population for New Zealand that was in Southland

1.1%
The increase in estimated resident population in Southland, between 30 June 2019 and 2020.

The 2018 NZ Census found:
86.5% of the population in Southland identified as European, **14.9%** were Maori, **5.5%** were Asian, **2.6%** Pasifika, **0.6%** MELAA and **1.5%** identified as other ethnicity.

Based on an approximate calculation of 2018 Census Data Urban Rural, approximately 4.6% of New Zealand's rural population resides in Southland. **The rural population is Southland** is approximately **37%, or 36,063 people.**

Southland District

Southland District's population, at 30 June 2020

32,500
The estimated resident population

0.9%
The percentage of the total estimated resident population for New Zealand that was in Southland District

1.2%
The increase in estimated resident population in Southland District, between 30 June 2019 and 2020

Gore

Gore District's population, at 30 June 2020

12,900
The estimated resident population

0.3%
The percentage of the total estimated resident population for New Zealand that was in Gore

0.8%
The increase in estimated resident population in Gore District, between 30 June 2019 and 2020

Invercargill

Invercargill's population, at 30 June 2020

57,100
The estimated resident population

1.1%
The percentage of the total estimated resident population for New Zealand that was in Invercargill

0.9%
The increase in estimated resident population in Invercargill, between 30 June 2019 and 2020

Southland Regional Snapshot

Age Profile and Education

Item	Year	Southland	New Zealand	Comment
Age Profile				
0-14	2018	20%	19%	Southland's age profile at 2018 was similar to New Zealand's age profile. 1 in 5 residents were aged 14 or younger, with 63% of the population being of working age (not including those 65+).
15-24		12%	14%	
25-64		51%	52%	
65+		17%	15%	
Median Age	2018	39.8	37	Southland has a higher median age than New Zealand. This shows our population is slightly older, which may become an issue when considering our aging workforce. Māori have a younger median age (25.1) than the rest of the Southland population (when the population is not separated into distinct communities). This reflects the greater number of Māori youth in the region compared with the rest of the region's population.
Age dependency ratio	2018	58.75	55	Southland has a higher age dependency ratio than New Zealand as a whole. A high dependency ratio indicates that the working age population and overall economy face a greater burden to support and provide the social services needed by children and by older persons who are often economically dependent.
Education				
Percentage aged 15+ years Level 1-3	2018	34.7% 27,105	30.3%	
Percentage aged 15+ years Level 4-6	2018	18.4% 14,319	17.4%	
Percentage aged 15+ years with Bachelor's degree or higher (Level 7 and above)	2018	14.1% 11,004	23.3%	
Percentage aged 15+ years with no formal qualification	2018	25.3% 19,770	16.9%	

Impacts of COVID-19 on the Region

Understanding the impacts of COVID-19

Impacts of COVID-19 on key specialist industries and sectors

Southland performed strongly through COVID-19 lockdown, expected to recover well

With key industries such as agriculture and food manufacturing considered essential industries, 59% of Southland's economy was able to operate under Alert Level 4, compared to 53% nationally. Under Alert Level 3, 80% of Southland's economy was able to operate, compared to 74% nationally. Southland's primary sector and food manufacturing industries provided strength throughout lockdown, and are expected to provide stability during the recovery.

Tourism is an important contributor to Southland's economy, but is expected to suffer for some time. Domestic tourism has helped to plug the tourism deficit, but is only a partial offset for international visitor spending. Reopening our border to Australia and the rest of the world will help, but international tourism faces serious headwinds in recovery, with only an 80% recovery expected by 2025. Tourism presents an opportunity for New Zealand to shift its offering from volume to value.

Steady outlook for the economy and employment

The outlook for Southland's economy over the next five years is steady. Employment in the region is forecast to decline slightly due to COVID-19-induced recession, down by 0.3% in 2021 and 0.4% in 2022. Employment is forecast to grow strongly in 2023 and 2024, recovering to pre-COVID levels by 2023. Growth tapers off in 2025 as the expected closure of the Tiwai Point smelter comes into effect.

The loss of international tourism drives employment decline between 2020 and 2022 in the medium scenario. The strongest employment declines are expected in accommodation and food services (-25%); transport, postal and warehousing (-11%); and arts and recreation services (-7%).

Information, media and telecommunications suffers a 17% fall in employment due to a loss of advertising revenue and an ongoing trend of centralisation. Growth is expected in the near term in health care and social assistance (8%), public administration and safety (6%), and education and training (5%)

Most industries are expected to be back to their pre-COVID size by 2025 under the medium scenario. Employment in tourism related industries is expected to be slightly below pre-COVID levels, as international visitor arrivals aren't expected to have fully recovered.

Construction will help through the recession

Construction was strong pre-COVID, and should hold up relatively well in the region, particularly with the region receiving shovel-ready project funding from central government. Central government has this far announced funding of $66.5m for six projects in Southland, worth a combined $327.1m. Residential construction is forecast to dip slightly going into the recession, while non-residential construction is forecast to grow on the back of the $243m Invercargill Central development.

Southland is at risk of substantial labour shortages over the medium to long term

Southland's population is ageing due to high birth rates in the 1950-1960s, and low birth rates since. The closure of major employers (such as freezing works in the 1990s) led to depopulation followed by stagnant population growth in the region. These factors have contributed to expectations of widespread labour shortages from 2018 onwards, although they have been ameliorated in the short term. At a regional level, the attraction of domestic migrants and support for greater labour force participation may help. Employer- and industry-specific approaches are also needed.

Supporting greater participation

Southland's Workforce Strategy for 2014-2031 identified an opportunity to increase labour force participation in younger workers, older workers, female workers and migrant workers. A reassessment in 2020 showed that participation has risen, both overall and in the specific groups identified in the strategy. Continued focus on growing and sustaining high rates of participation is an important long-term solution to ensure the region's existing population is engaged in employment.

Tiwai closure is inevitable

Closure of the Tiwai Point smelter is inevitable, despite the recently announced extension to its operation (until December 2024). The smelter faces competition from more efficient and lower-cost smelters in Canada and China. Southland is investigating and beginning to develop new industries to create alternative employment for smelter workers.

The smelter is estimated to directly and indirectly support 2,300 jobs across the region, a volume which cannot immediately be absorbed into the local labour market. However over time, retirement and employment growth is likely to absorb this number of workers.

Maintaining Southlands Population size

The risk of job losses from the likely closure of Tiwai and transition in agricultural land use, means decline in employment is highly likely in the region over the short to medium term. A short-term employment decline may in turn lead to a brief period of weak population growth. Nationally, all regions will be seeking to replace a growing number of retiring workers, meaning that competition for migrant workers will be high. Maintaining Southland's population size over the long term may be a more achievable goal.

Employment growth drives population growth

Southland's population is forecast to continue growing on the back of sustained employment growth. Population growth is still expected to be strong in 2025, but may taper off in subsequent years as the closure of the Tiwai Point dampens employment growth. Given the strength of underlying employment demand and the likely development of alternative industries, it appears unlikely that the population will decline in response to the Tiwai Point smelter closure. It is critical to start the transition to alternative industries

Environmental regulations may constrain output

Freshwater and carbon regulation hit primary sector Increasing stringency in environmental regulations – related to carbon emissions and freshwater – will soon start to constrain output from Southland's key agriculture activities such as dairy cattle farming. The combination of regulation is expected to reduce fertiliser application, grazing area, and grazing intensity. This will adversely effect employment, both on-farm and in downstream processors such as dairy and meat product manufacturing. By some estimates, this might lead to a 15-20% drop in employment.

At the same time, it may in practice encourage land use changes. Growing oats for plant-based milk, supported by development of a new oat milk factory in the region, is emerging as a promising alternative land use.

Opportunities for alternative industries

The private sector, as well as local and central government, are exploring options to develop alternative industries to generate employment opportunities, particularly 'green industries' which can utilise the surplus low-carbon electricity from Manapōuri Power Station. Opportunities being mooted include expansion of the aquaculture industry around Stewart Island, production of hydrogen using green electricity, development of a data centre, and production of batteries. Closure of the smelter is also expected to lead to a $350m, five-year remediation project, which will create employment opportunities in the short to medium term.

Some control over the value chain, but undifferentiated products

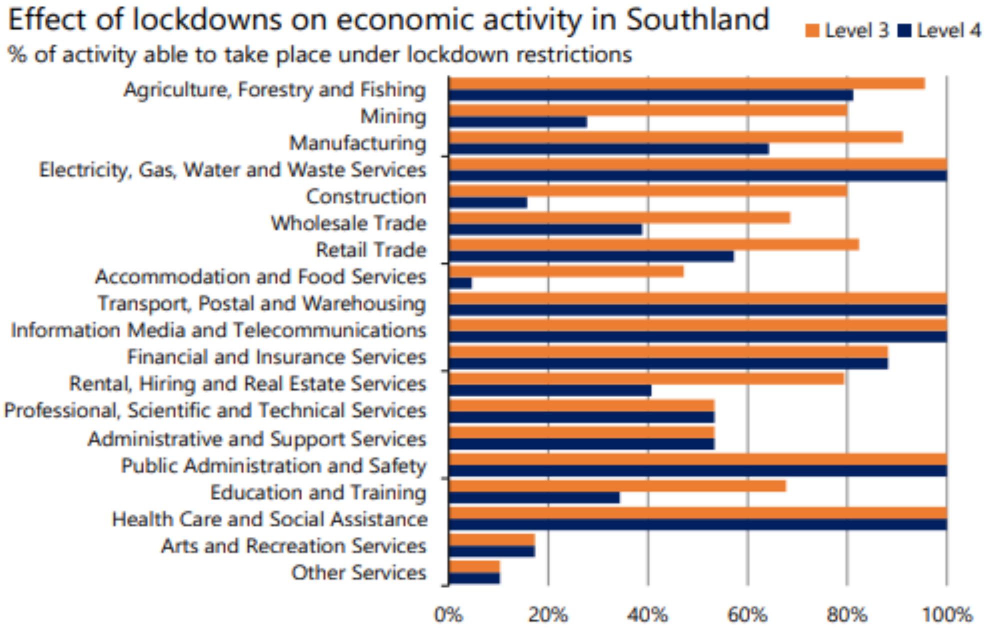
Southland controls a relatively large share of the value chain for dairy and meat products - with primary production and processing taking place within the region, and ownership of associated branding often held in farmer-owned cooperatives. However, many of the exported dairy products are relatively undifferentiated (such as skim milk powder), meaning returns are highly sensitive to commodity prices.

In the case of aluminium, Southland is only responsible for part of the supply chain (smelting), and the nature of Tiwai Point as a tolling plant means returns to the region are highly sensitive to commodity prices. Southland's forestry exports are predominantly of raw logs, with $120m of forestry exports compared to $67m of wood and paper product exports.

Southland's exporters could reduce exposure to commodity prices by gaining greater control over the downstream supply chain of exports, and developing intellectual property and alternative markets for products. Gaining greater control over the supply chain of exports may involve the location of further downstream processing capacity within the region. The development of intellectual property and alternative markets may involve developing a unique brand proposition for their exports which reflects their provenance, and which is understood by consumers, in order to earn a price premium. As an example, this process has already been initiated in the case of New Zealand salmon exports.

Effect of lockdowns on Economic Activity

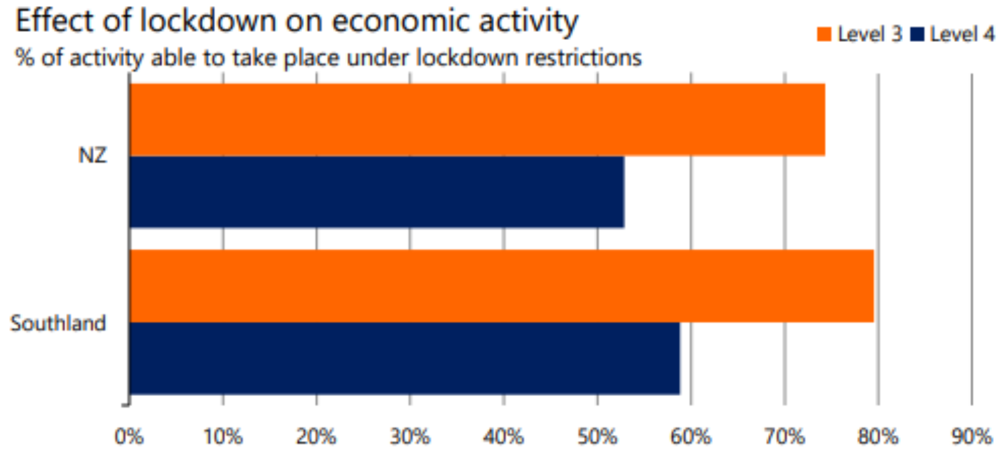
Chart 1



The effect of the lockdown restrictions on the Southland Region is shown in Chart 1. Industries which were classified as essential, such as agriculture, fishing and food manufacturing were allowed to operate fully throughout the Level 4 lockdown. However these are grouped with other industries, such as forestry and non-food manufacturing, which were not able to fully operate.

For industries such as professional, scientific and technical services, many workers were able to continue to work from home.

Chart 2



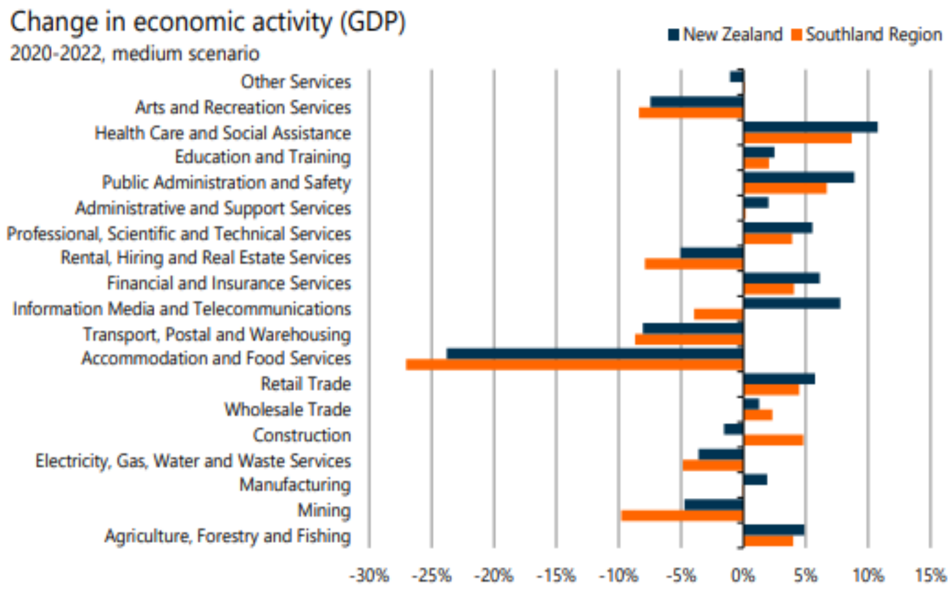
A greater proportion of Southland's economy is based on essential industries such as agriculture and food manufacturing, compared to the national average. This meant that a greater share of Southland's economy was able to operate under both Level 4 and Level 3 restrictions.

The activity that was able to take place in Southland was estimated that 59% of Southlands economy could operate under level 4, compared to 53% nationally. Likewise, under Level 3 restrictions. 80% of the regions economy was able to operate compared to 74% nationally.

Understanding the impacts of COVID-19

Change in Economic Activity (GDP)

Chart 3

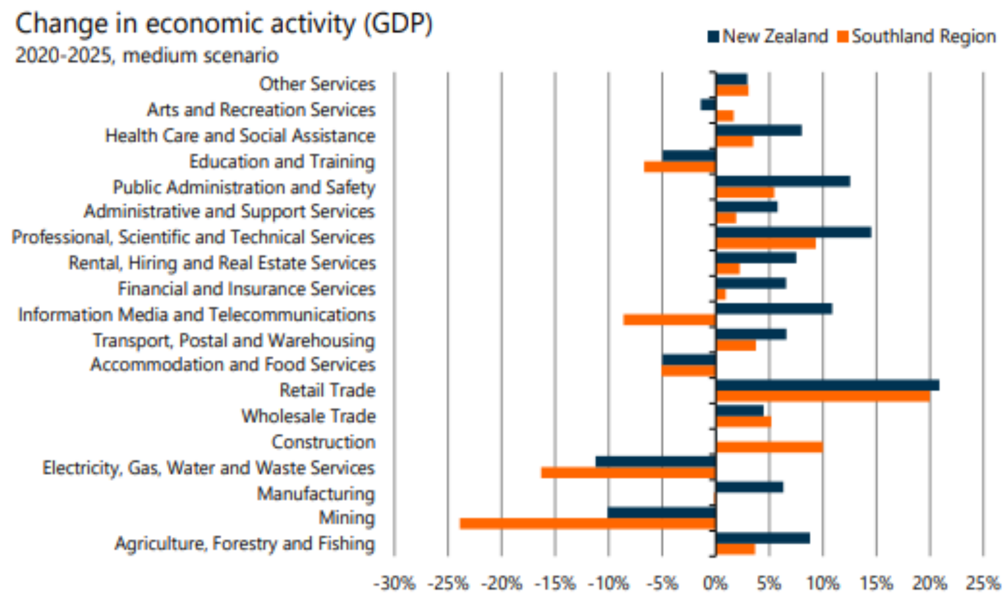


Many of Southland and New Zealand's industries will experience reduced economic activity in 2022, which is indicative of the low point of the COVID-19-induced recession.

Tourism-related industries are among the worst affected, with accommodation and food services industry GDP down by 27% in Southland; and transport, postal and warehousing down by 9%. Mining GDP is forecast to decline by 10% due to the closure of the Waikaia gold mine.

Growth is expected across a variety of industries, notably health care and social assistance (9%) and public administration and safety (7%).

Chart 4



Economic activity in most industries is expected to recover by 2025. Accommodation and food services is still expected to be below 2020 levels due to the slow recovery of international visitor arrivals.

Mining industry GDP remains down following the closure of the Waikaia gold mine. The decline in electricity, gas, water and waste services GDP is largely driven by a correction in the electricity distribution sub-industry, following a spike in activity over 2018-2020.

Economic and Labour Market Profile

Economic and Labour Market Profile

Southland's Top 10 Industries

ANZSIC206 Industry Classification	Employee Count (2020)	Job share (Southland)	Job share (Rest of NZ)	Average annual growth from 2015 to 2020	GDP (2018) ($)	Southland GDP (2018) (%)	NZ GDP (2018) (%)
Agriculture, Forestry & Fishing	10,578	17.9%	6.1%	-0.1%	1,065M	17.7	8.6
Manufacturing	8,784	14.9%	9.5%	1.0%	839M	14.0	2.8
Retail Trade	5,449	9.2%	9.0%	1.6%	256M	4.3	2.0
Health Care & Social Assistance	5,104	8.6%	9.1%	1.8%	288M	4.8	1.7
Construction	4,447	7.5%	9.4%	1.7%	335M	5.6	1.8
Education & Training	3,850	6.5%	7.5%	1.8%	182M	3.0	1.5
Accommodation & Food Services	3,832	6.5%	7.4%	3.9%	138M	2.2	5.0
Professional, Scientific, & Technical Services	2,793	4.7%	9.3%	3.1%	201M	3.3	0.9
Transport, Postal & Warehousing	2,460	4.2%	4.1%	1.7%	288M	4.8	2.2
Wholesale Trade	1,909	3.6%	4.8%	2.0%	165M	2.7	1.2

Top 10 Industries:

- Agriculture, Forestry and Fishing has the largest employee count and job share for Southland, but has experienced negative growth since 2015. It contribute over 17% of Southland's GDP, and 8% of National GDP.
- Manufacturing is Southland's second largest industry by employee count, job share and GDP contributions.
- Accommodation and Food Services have experienced almost 4% annual growth in the five years between 2015 to 2020, representing the growth in importance to the region for this industry. This may be reflected through tourism in certain areas and changing consumer expectations around the food and accommodation experiences and choices.

Other Southland Industry key points:

- 93% of Southland businesses are small and medium enterprises (less than 20 employees)
- Very little growth in net new business units in Southland in last 10 years
- High reliance on primary sector and manufacturing, in terms of employees and GDP contribution. The benefits of our two leading sectors flow through to other enabling sectors such as transport, wholesale trade and professional services
- Aging workforce is illustrated in primary sector with 20% of farmer and farm managers over 65 years

Economic and Labour Market Profile

Employment and Productivity

Item	Year	Southland	New Zealand	Comment
Employment				
Employment Rate	2021	69.8% 6,900 ppl	67.6%	Southland’s employment rate is just slightly above that for New Zealand. This is the current percentage of skilled and unskilled labour employed within the economy.
Labour Force participation	2021	72.2%	70.5%	Southland’s labour force participation rate is 2.2% higher than nationally. High participation combined with a low unemployment rate is a sign of a robust labour market.
Unemployment Rate	2021	3.3% 1,900 ppl	4.0%	Southland’s unemployment rate sits just below that of New Zealand. The low unemployment rate may contribute to the tight labour market currently being experienced by many employers within the region.
Youth Not in Employment, Education or Training (NEET) Aged 15-24	2021	16.1% 2,000 ppl	10.8%	Southland's NEET rate is more than 5% higher than for New Zealand as a whole, which is concerning for those aged 15-24 who are unemployed or not in education.
Underutilisation rate	2021	11.3%	10.5%	Southland has a slightly higher rate of underutilisation – the sum of those unemployed, underemployed, who are not actively seeking but are available and wanting a job, and people who are actively seeking but not currently available, but will be available to work in the next four weeks.
Exclusion and disadvantage of Young People Young people are identified as 12-25	2020	27% 4,212 ppl	23% 190,332	Young people in Aotearoa experience exclusion through our interactions with the Care and Protection and Justice systems. As a result, they face disadvantages in education and employment. There are three criteria used to inform the level of exclusion and disadvantage. These are interactions with: • Care and protection • Employment and Education • Justice
Productivity				
GDP	2019	$6.359M	$323.1B	Southland contributes to approximately 2% of New Zealand’s overall GDP.
Building Consents	2020	343	39,420	Southland total number of building consents processed in 2020
Business Births Business Deaths	2020	408 417		2004 was the peak for businesses commencing operation, with a high of 723; this year also saw a high of businesses ceasing operation at 663. Business births/deaths have continued to decrease, apart from a peak of business births in 2015.

Economic and Labour Market Profile

Labour Market Summary – June 2021 Household Labour Force Survey

Participation Rate

Southland Participation Rate - 72.2%

The highest participation rate is 77.1% on the West Coast, followed by 74.3% in Wellington with Southland coming in 3rd at 72.2%. Southland sits above the national participation rate of 70.2%.

Employment

Southland Employment Rate - 69.8%
Total Employed – 56,900

In March 2021, 10.8% of Southlands filled jobs were occupied by those in the age range of 25-29. The range is fairly close between ages 25-29, 30-34 and 35-39, all siting between 10 - 11%.

Those in the 15-19 age range made up 5.98% of filled jobs, while those in the 65+ range made up a similar 5.7%

Unemployment

Southland Unemployment Rate - 3.3%
Total Unemployed – 1,900

Southland has one of the lowest unemployment rates across NZ, and is lower than the national rate of 3.9% unemployment.

Underutilisation

Current Underutilisation Rate for Southland - 11.3%

Underutilisation - the sum of those unemployed, underemployed, who are not actively seeking but are available and wanting a job and people who are actively seeking but not currently available, but will be available to work in the next four weeks. *Note – Stats NZ counts 32 hours as full time work – so even those on rosters who are able/want to work more than 32 hours may not be captured within the underemployed category.*

Not in Employment, Education, or Training (NEET)

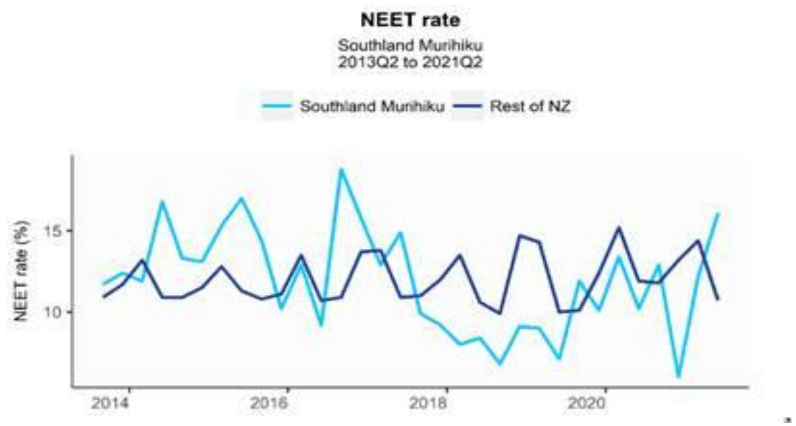
Southland NEET Rate - 16.1%
Total number of NEET – 2000

NEET rate is the number of 15-24 years who are not in the education, employment or training. They are asked whether or not they are in education and their Labour Force status. It can vary at a region level as:

- HLFS is a survey and the sample size of 15-24 years old in Southland is likely small
- There can be seasonal increases in NEET as education to employment

Further commentary on NEET:

NEET Rate – Southland Murihiku, 2013 Q4 to 2021 Q2



(Source: MBIE, 2021)

As seen in the graph above, Southland (and the rest of New Zealand) NEET rates tend to fluctuate. NEET rates are taken from the Household Labour Force Survey completed by Stats NZ.

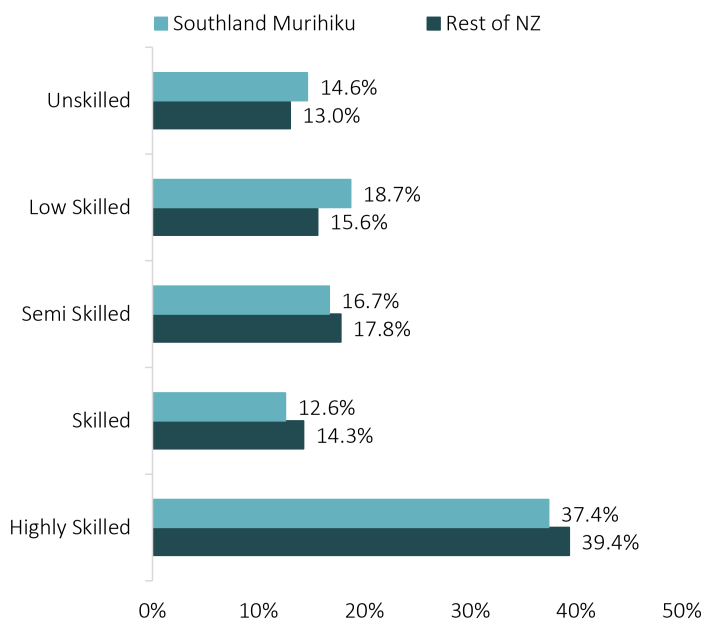
The Household Labour Force Survey may only be able to obtain a small sample size for the Southland population of 15-24 years olds which may result in under/overestimation based on the current population at the time. This is due to the actual ability to interview 15-24 years old people, who may not wish to take part in the survey or are not available at the time. Fluctuation may also be due to seasonal factors (i.e. finishing education but not enrolled in another term, not looking for work).

Skills Profile

Skills Profile

Skill Levels

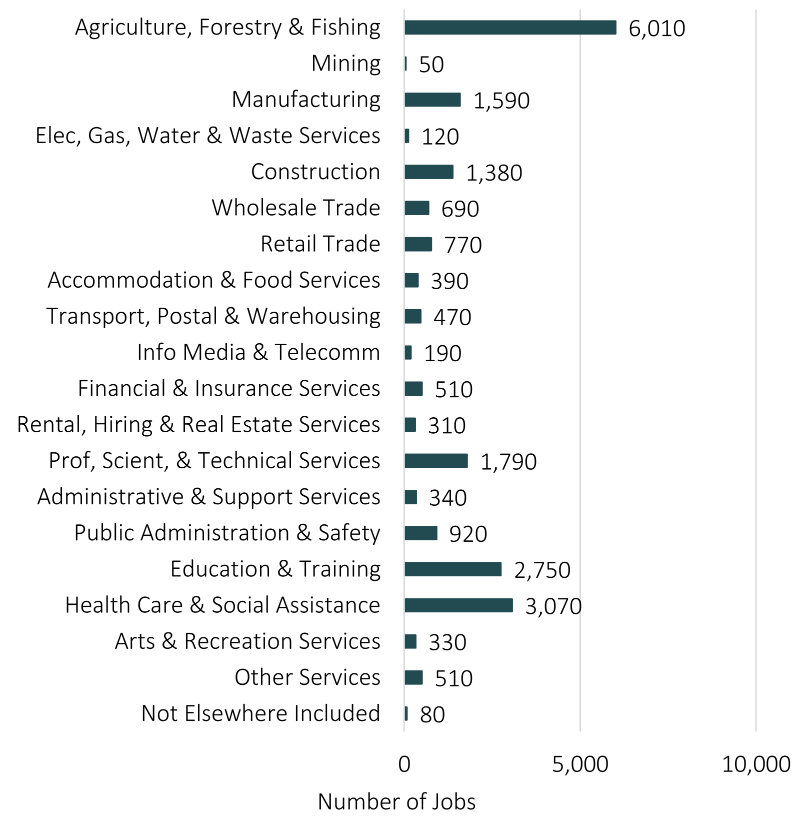
Share of Employees by Skill Level in Southland Murihiku, 2021



Skill Level	Number of jobs	Share of workers (Southland Murihiku)	Share of workers (Rest of NZ)	Growth rate from 2019 to 2021 (Southland Murihiku)
Highly Skilled	22,260	37.4%	39.4%	7.2%
Skilled	7,470	12.6%	14.3%	4.8%
Semi Skilled	9,930	16.7%	17.8%	2.2%
Low Skilled	11,130	18.7%	15.6%	1.8%
Unskilled	8,700	14.6%	13.0%	0.3%
Total	59,490			4.0%

(Source: MBIE Detailed Regional Employment Estimates, 2021)

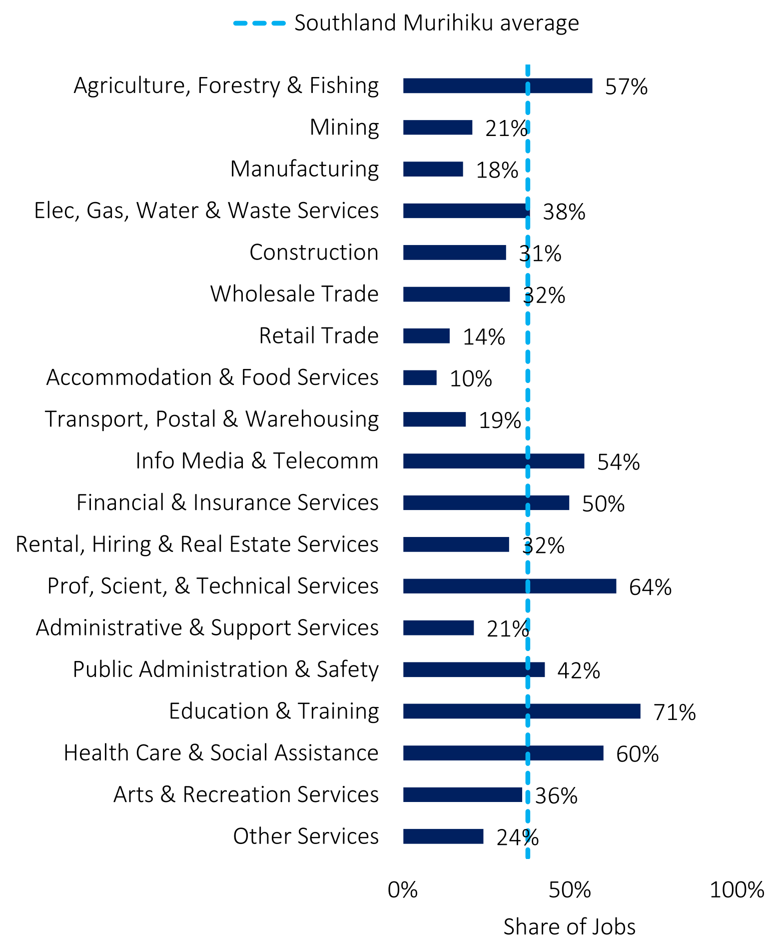
Number of jobs classed as Highly Skilled in each industry in Southland Murihiku, 2021



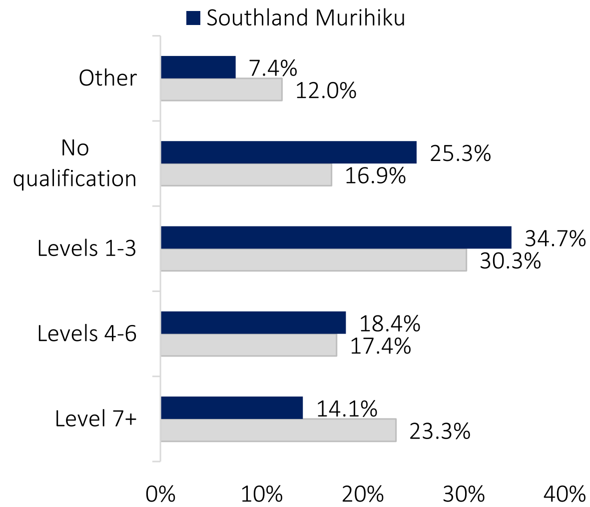
Skills Profile

Skill Level and Qualifications

Share of jobs classed as Highly Skilled in each industry compared to the Southland Murihiku average (2021)



Share of Qualification Level in Southland Murihiku, 2018



Qualification Level	Number of people who hold each Qualification (2018)	Share of Qualification 2018 (Southland Murihiku)	Share of Qualification 2018 (Rest of NZ)	Percentage point change in share between 2013 to 2018 (Southland Murihiku)
Level 7+	11,004	14.1%	23.3%	3.8%
Levels 4-6	14,319	18.4%	17.4%	1.2%
Levels 1-3	27,105	34.7%	30.3%	2.4%
No qualification	19,770	25.3%	16.9%	-1.5%
Other	5,805	7.4%	12.0%	-6.0%
Total	78,003			

(Source: MBIE Detailed Regional Employment Estimates, 2021)

Education Profile

Southland Region at a Glance

The region has a lower average percentage of school leavers with NCEA Level 3 or above than the national average (44.7% vs 54%) YEAR

In 2019, 845 learners obtained University entrance

Māori learners obtaining level 3 or above was 33%. This is well below the percentage of Pakeha in the region obtaining Level 3 or above (47.1%) and below the region overall (44.7%)

Southland District

Increase in school leavers with NCEA level 3 or above between 2017-2019 (from 98 to 118 students, or 39% to 44.9%)

In 2019, Maori student % with NCEA Level 3 or above was 31.6, up from 21.3 in 2017. This is still below Pakeha % of 48.3 in 2019.

Below NZ 2019 % of students obtaining NCEA Level 3 or above (44.9% compared to 54%)

Gore District

Decrease in school leavers with NCEA level 3 or above between 2017-2019 (from 75 to 65 students, or 47.2% to 38%)

In 2019, Maori student % with NCEA Level 3 or above was 28.0, down from 34.8 in 2017. This is still below Pakeha % of 39.5 in 2019.

Below NZ 2019 % of students obtaining NCEA Level 3 or above (38% compared to 54%)

Invercargill

Increase in school leavers with NCEA level 3 or above between 2017-2019 (from 44.7% to 46.1%); however, lower rolls = lower total students (from 373 to 369)

In 2019, Maori student % with NCEA Level 3 or above was 35.1, down from 21.3 in 2017. This is still below Pakeha % of 48.5 in 2019.

Below NZ 2019 % of students obtaining NCEA Level 3 or above (46.1% compared to 54%)

Southland Education Profile

Regional Snapshot

Southland Regional Summary 2019

Description	Southland Region	New Zealand
Number of students (2019)	16,998.0	816,632.0
Number of teachers in state and state integrated schools (2019)	1,404.0	61,539.0
Number of schools (2019)	83.0	2,534.0
Percentage of children starting school who have attended ECE (2019)	97.5	97.1
Percentage of school leavers with NCEA Level 1 and above (2019)	88.9	87.9
Percentage of school leavers with NCEA Level 2 or above (2019)	77.0	78.8
Percentage of school leavers with NCEA Level 3 or above (2019)	44.7	54.0
Age standardised stand-down rate per 1,000 students (2019)	42.3	29.0
Age standardised suspension rate per 1,000 students (2019)	5.0	4.3
Age standardised exclusion rate per 1,000 students (2019)	2.1	1.6
Percentage of school leavers retained to at least 17-years-old (2019)	78.4	82.0
Percentage of school leavers with a Vocational Pathway award (2019)	19.2	18.9
Percentage of school leavers enrolled in tertiary within one year of leaving (2018)	65.2	59.7

Spotlight on our Territorial Authorities

Southland District (compared to NZ Measure)

higher rate of school stand downs per 1,000 students (53.7 in 2019)

higher rate of both suspensions and exclusions (8.3 and 3.8 in 2019, respectively)

lower rate of school leavers with ncea level 3 or above (44.9% in 2019)

lower number of school leavers retained to at least 17 years old (79.8% in 2019); lower number of school leavers with a vocational pathway award (13.7 in 2019)

higher number of school leavers enrolled in tertiary within one year of leaving (60.2% in 2018)

Gore District (compared to NZ Measure)

higher rate of school stand downs per 1,000 students (39.1 in 2019)

higher rate of both suspensions and exclusions (7.4 and 2.0 in 2019, respectively)

lower rate of school leavers with ncea level 3 or above (38% in 2019)

lower number of school leavers retained to at least 17 years old (73.1% in 2019); lower number of school leavers with a vocational pathway award (16.4 in 2019)

higher number of school leavers enrolled in tertiary within one year of leaving (66.7% in 2018)

Invercargill (compared to NZ Measure)

higher average rate of stand downs per 1,000 students (38.4 in 2019)

lower rate of both suspensions and exclusions (3.3 and 1.5 in 2019, respectively)

lower rate of school leavers with ncea level 3 or above (46.1% in 2019)

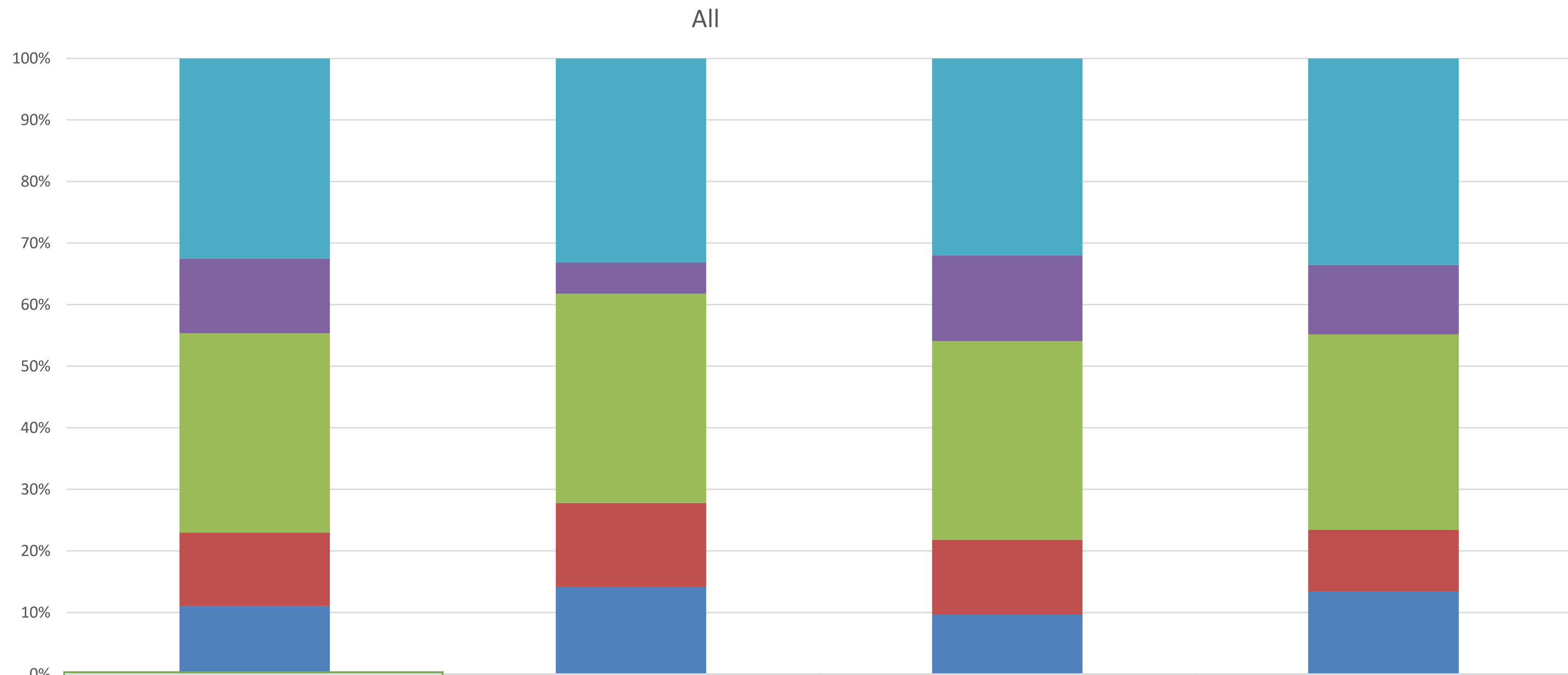
lower percentage of school leavers retained to at least 17 years old (79% in 2019); higher number of school leavers with a vocational pathway award (21.6 in 2019)

higher number of school leavers enrolled in tertiary within one year of leaving (66.5% in 2018)

Southland Education Profile

Highest Qualification Attained by Secondary School Leavers - 2019

In 2019, 845 learners in the Southland region obtained university entrance.
This number does not necessarily reflect the number of learners who went on to enrol in University courses.

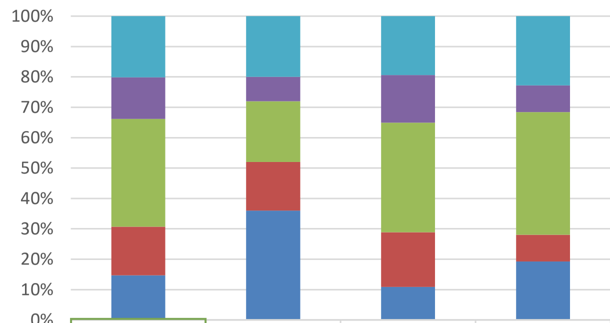


	Southland Region	Gore District	Invercargill City	Southland District
University Entrance	845	117	543	185
Level 3 or above	316	18	236	62
Level 2 Qualification	842	120	547	175
Level 1 Qualification	310	48	207	55
Below Level 1 Qualification	287	50	163	74

Southland Education Profile

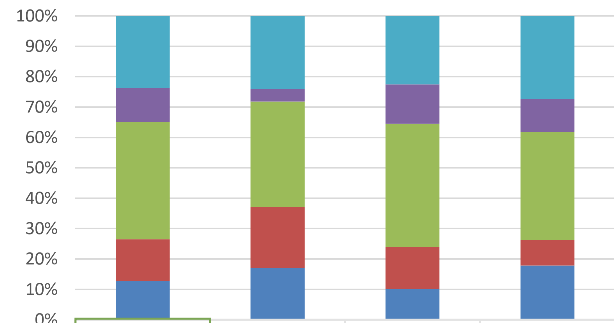
Highest Qualification Attained by Maori and Pacific, and, Male and Female Secondary School Leavers - 2019

Maori



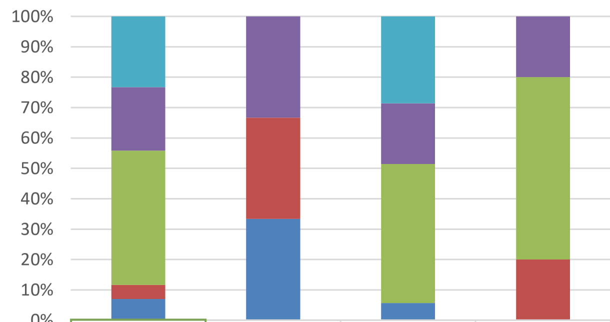
	Southland Region	Gore District	Invercargill City	Southland District
University Entrance	59	5	41	13
Level 3 or above	40	2	33	5
Level 2 Qualification	104	5	76	23
Level 1 Qualification	47	4	38	5
Below Level 1 Qualification	43	9	23	11

Male



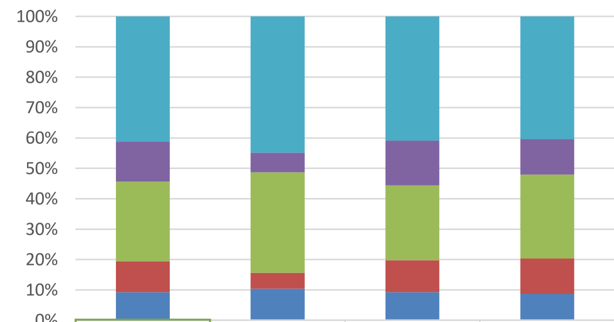
	Southland Region	Gore District	Invercargill City	Southland District
University Entrance	310	48	184	78
Level 3 or above	145	8	106	31
Level 2 Qualification	502	69	331	102
Level 1 Qualification	178	40	114	24
Below Level 1 Qualification	167	34	82	51

Pacific



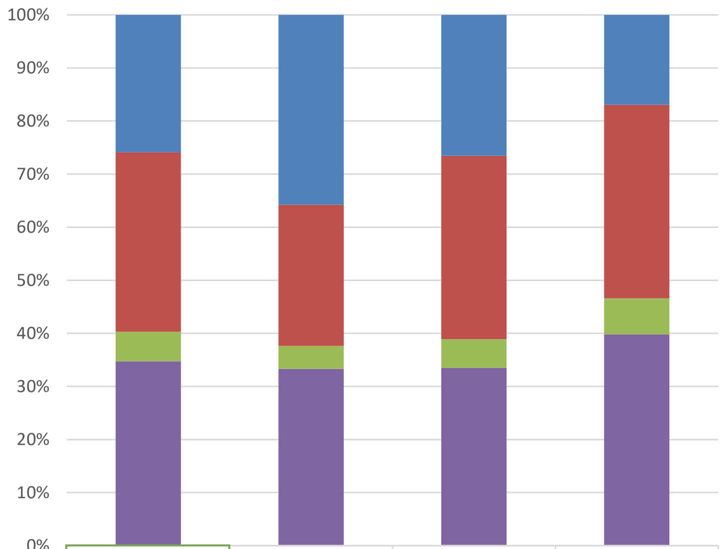
	Southland Region	Gore District	Invercargill City	Southland District
University Entrance	10		10	
Level 3 or above	9	1	7	1
Level 2 Qualification	19		16	3
Level 1 Qualification	2	1		1
Below Level 1 Qualification	3	1	2	

Female



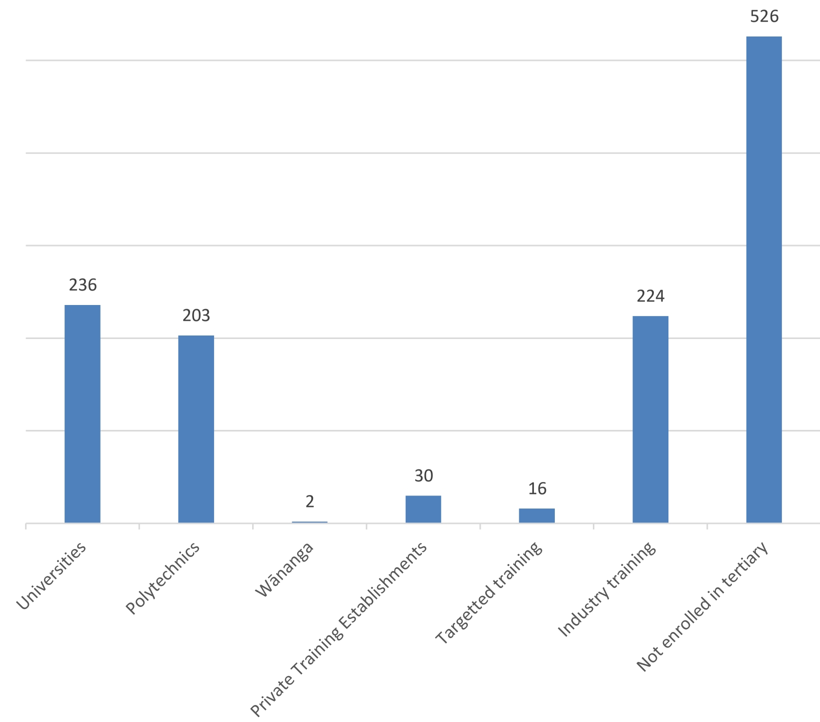
	Southland Region	Gore District	Invercargill City	Southland District
University Entrance	535	69	359	107
Level 3 or above	171	10	130	31
Level 2 Qualification	340	51	216	73
Level 1 Qualification	132	8	93	31
Below Level 1 Qualification	120	16	81	23

School leavers in their first year after leaving, by qualification level and Territorial Authority, 2019



	Southland Region	Gore District	Invercargill City	Southland District
Bachelors and above	304	58	206	40
Certificates & diplomas 3-7	397	43	268	86
Certificates 1-2	65	7	42	16
Not enrolled in tertiary education	408	54	260	94

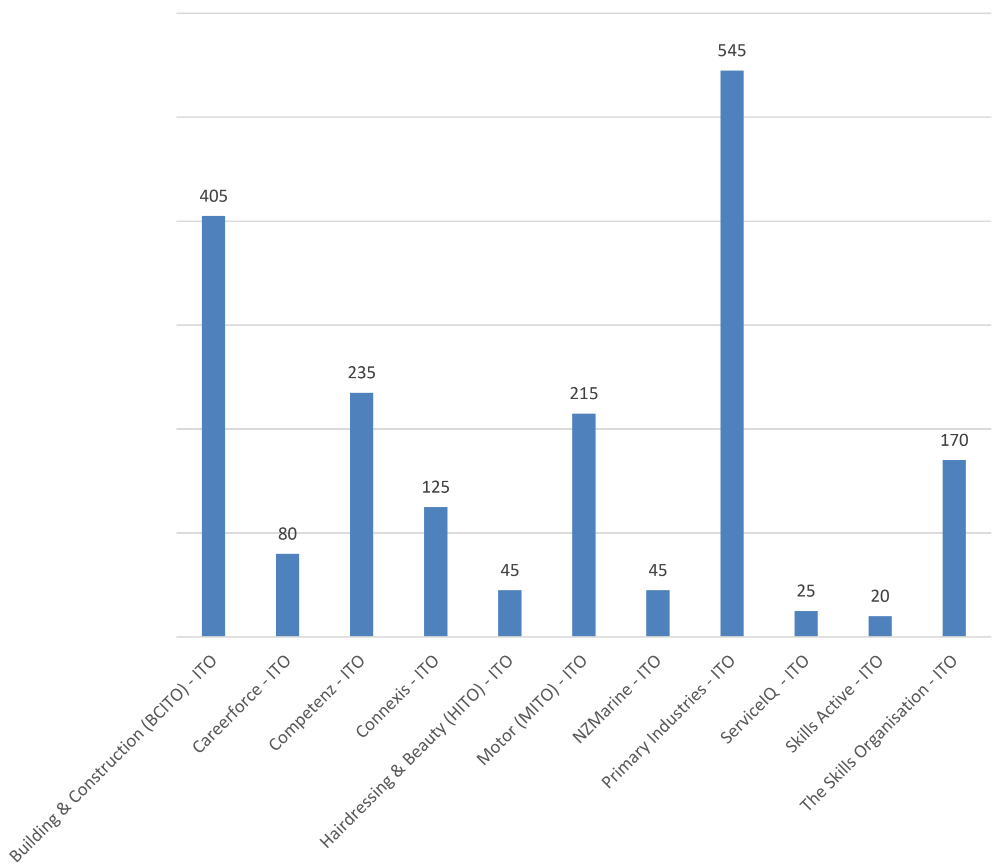
This table only represents education as an option for school leavers. It is possible that while our region has around a third of school leavers not enrolled in tertiary education, those school leavers have sought other pathways post secondary school including taking up work that may not necessarily be captured through training institutes.



Southland Education Profile

Post-secondary school snapshot

Total amount of apprentices in the region, by ITO (2020)



Trading Name	Organisation name	Gazette recognition
BCITO	Building and Construction Industry Training Organisation	Building, construction, flooring, masonry, glass and glazing, joinery, interior systems, and painting and decorating.
Careerforce	Community Support Services Industry Training Organisation Limited	Health and disability support, social and community support, cleaning, caretaking, and pest management.
Competenz	Competenz Trust	Engineering, manufacturing, forestry, communications and media, maritime and rail transport, and other trades (locksmithing, fire protection, refrigeration, heating and air conditioning).
Connexis	Infrastructure Industry Training Organisation	Civil construction, electricity supply and transmission, water, and telecommunications.
HITO	New Zealand Hair and Beauty Industry Training Organisation Incorporated	Hairdressing, barbering and beauty.
MITO	MITO New Zealand Incorporated	Automotive, commercial road transport and logistics, stevedoring and ports, freight forwarding and distribution, industrial textile fabrication, extractives and drilling, gas, protective coating, and resource recovery.
NZ MAC ITO	Boating Industries Association of New Zealand Incorporated	Boat building design and manufacturing, composite manufacturing, marine support services, and sail making.
Primary ITO	Primary Industry Training Organisation Incorporated	Agriculture, horticulture, sports turf, equine, dairy manufacturing, meat processing and seafood, and petrochemical, energy and chemical plant.
ServiceIQ	Service Skills Institute	Tourism, travel, retail, hospitality, museums, aviation and wholesale goods operations.
Skills Active Aotearoa	Skills Active Aotearoa Limited	Sports, fitness and recreation, snowsport and performing arts.
The Skills Organisation	The Skills Organisation	Plumbing, gasfitting, drainlaying, roofing, electrotechnology, real estate, financial services, local government, public sector (with some exclusions), security, contact centre, offender management, cranes and scaffolding, ambulance, emergency management, and fire services.

Southland Education Profile

Where do our school leavers go? (first enrolments since 2010)

Studying inside Southland

5,368 total learners

Approximately 36 providers available inside Southland, with those above 3% of learners enrolled including:

- Southern Institute of Technology 2,715 / 50.8%
- Primary ITO 898 / 16.8%
- BCITO 234 / 4.4%
- Community Colleges NZ Ltd 209 / 3.9%
- Competenz Trust 179 / 3.4%
- University of Otago 169 / 3.2%

237 total Extramural learners inside Southland

Studying outside of Southland

4,521 total learners

Approximately 124 providers available outside Southland, with those above 3% of Southland learners enrolled including:

- University of Otago 1,706 / 39.0%
- Otago Polytechnic 476 / 10.9%
- University of Canterbury 466 / 10.7%
- Lincoln University 330 / 7.6%
- Victoria University of Wellington 170 / 3.9%
- The Skills Organisation Inc. 142 / 3.2%

94 total Extramural learners outside Southland

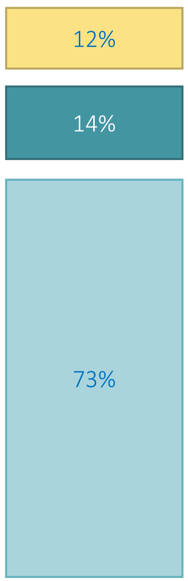
Southland Education Profile

Southland's Excluded and Disadvantaged Young People
Southland Young People Not in Education, Employment or Training (NEET Rates) - 2020

Young people in Aotearoa experience exclusion through our interactions with the Care and Protection and Justice systems. As a result, they face disadvantages in education and employment. Young people are identified through the age groups of 12-15, 16-18, and 19-25.

There are three criteria used to inform the level of exclusion and disadvantage. These are:
- Care and protection
- Employment and Education
- Justice

Serious exclusion includes young people who have experienced disadvantage across all three areas; **Moderate exclusion** includes young people who have experienced disadvantage across two areas. Youth experiencing **No exclusion and disadvantage** may have still had interactions with Police or youth justice, or stand down from school, but are isolated events.



Serious exclusion and disadvantage

Moderate exclusion and disadvantage

No exclusion and disadvantage
(may have still had interactions with Police or youth justice, or stand down from school, but are isolated events)

Total: 4,212 excluded and disadvantaged young people (27%) within the Southland Region, compared with 190,332 excluded and disadvantaged young people (23%) in Aotearoa (2020)

Spotlight on our Territorial Authorities

Southland District:

- 1,002 excluded and disadvantaged young people (21%)
- Māori youth are more likely to experience serious and moderate exclusion and disadvantage (approx. 35%) than other young people, although Pākehā experience some serious and moderate exclusion and disadvantage (approx. 15%)
- Males are slightly more likely to experience serious and moderate exclusion than females in the region (approx. 20% compared with 18%)

Gore District:

- 591 excluded and disadvantaged young people (29%)
- Māori youth are significantly more likely to experience serious and moderate exclusion and disadvantage (approx. 52%) than other young people, although Pākehā experience some serious and moderate exclusion and disadvantage (approx. 21%)
- Males are slightly more likely to experience serious and moderate exclusion than females in the region (approx. 21% compared with 18%)

Invercargill City:

- 2,619 excluded and disadvantaged young people (29%)
- Māori youth are more likely to experience serious and moderate exclusion and disadvantage (approx. 40%); Pākehā experience approx. 21% and Pasifika experience approx. 32%
- Males are slightly more likely to experience serious and moderate exclusion than females in the region (approx. 20% compared with 18%)

Not in Employment, Education, or Training (NEET)

Southland NEET Rate - 16.1%   Total number of NEET – 2000

NEET rate is the number of 15-24 years who are not in the education, employment or training. They are asked whether or not they are in education and their Labour Force status. It can vary at a region level as:

- HLFS is a survey and the sample size of 15-24 years old in Southland is likely small
- There can be seasonal increases in NEET as education to employment

Immigration Profile

Southland Immigration Profile

Range of data from 2009 to 2021

Number of people granted Essential Skills work visas by region of employment, 2006/07 to 2015/16

Region	Financial year										% change since 2014/15
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	
Auckland	9,860	10,585	10,191	7,873	8,094	7,016	6,639	7,580	8,668	11,249	30%
Canterbury	3,499	4,545	3,567	2,910	2,469	3,335	4,694	6,592	7,166	7,204	1%
Otago	3,259	3,904	3,206	2,645	2,531	2,482	2,604	2,927	3,190	3,914	23%
Wellington	2,376	3,496	2,637	1,978	1,869	1,963	1,979	2,119	2,061	2,094	2%
Waikato	1,673	1,776	1,492	1,100	1,086	1,198	1,195	1,342	1,450	1,513	4%
Southland	562	778	790	624	721	713	737	752	935	1,074	15%
Bay of Plenty	1,526	1,529	1,035	833	826	809	709	920	998	1,022	2%
Nelson/Marlborough/Tasman	1,274	1,886	1,285	748	609	659	641	756	796	950	19%
Manawatu-Whanganui	589	667	573	480	481	462	455	507	515	496	-4%
Hawkes Bay	955	750	382	304	299	284	331	380	429	438	2%
Northland	347	346	309	256	270	247	269	320	380	453	19%
Taranaki	551	854	595	496	514	505	479	710	424	288	-32%
West Coast	148	144	173	171	142	175	170	211	213	270	27%
Gisborne	116	91	111	88	111	152	172	181	193	152	-21%
Total where region is known	26,735	31,351	26,346	20,506	20,022	20,000	21,074	25,297	27,418	31,117	13%
Total Essential Skills workers	**31,015**	**36,333**	**29,626**	**22,947**	**22,341**	**22,065**	**22,406**	**26,497**	**28,548**	**31,766**	**11%**

Source: Ministry of Business, Innovation and Employment.

- From 2006 to 2015, there was almost double the number of people granted Essential Skills work visas for Southland, which was a significant boost to the population

Number of people granted student visas by region of study, 2006/07 to 2015/16

Region	Financial year										% change since 2014/15
	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	
Auckland	29,866	30,774	33,278	33,952	36,499	34,741	31,984	38,929	46,697	49,615	6%
Canterbury	8,746	8,224	8,422	8,639	7,367	5,189	5,215	5,832	6,720	7,512	12%
Wellington	4,805	4,508	4,231	4,422	4,371	4,162	4,148	4,204	4,628	5,206	12%
Waikato	3,942	3,761	3,810	3,821	3,705	3,674	3,494	3,667	3,985	5,036	26%
Otago	3,312	3,220	3,360	3,556	3,629	3,524	3,526	3,587	3,749	4,012	7%
Manawatu-Whanganui	2,369	2,249	2,220	2,283	2,327	2,494	2,240	2,247	2,314	2,282	-1%
Bay of Plenty	996	1,079	1,396	1,520	2,238	2,057	1,792	2,311	2,680	2,088	-22%
Nelson/Marlborough/Tasman	649	728	796	882	886	830	673	671	1,023	1,083	6%
Southland	185	187	226	344	434	501	526	648	767	934	22%
Hawkes Bay	494	517	555	543	598	689	543	623	745	878	18%
Taranaki	512	442	474	544	546	536	463	517	549	531	-3%
Northland	444	433	467	518	426	472	425	417	451	484	7%
Other	113	97	62	68	53	36	32	49	41	28	-32%
Total where region is known	56,433	56,219	59,297	61,092	63,079	58,905	55,061	63,702	74,349	79,689	7%
Total students	**67,149**	**69,105**	**73,107**	**72,755**	**74,096**	**68,905**	**64,189**	**73,423**	**84,856**	**91,261**	**8%**

Source: Ministry of Business, Innovation and Employment

Note 1: 'Other' includes Gisborne and West Coast.

Note 2: This includes secondary school and tertiary students.

Note 3: This is a count of individuals approved for a student visa rather than the number of visa applications. The number of approved student visa holders will be lower than the number of student enrolments reported by the Ministry of Education.

- Student visa numbers rose signifcantly between 2006 and 2015, from 185 visas granted to 934.

As of July 2021:

- Approx 1300 Employee Assisted Work Visas granted
- Approx 320 Student Visas granted, a significant decrease from previous years due to COVID-19 restrictions

Southland Immigration Profile

Common concerns about Immigration for the Region

The current situation is challenging for both employers and employees

- **Impact of tightening supply of global workforce** and future uncertainty of New Zealand's long-term net migration setting continues to be a significant and immediate concern for business, some sectors are feeling the immediate impacts more than others.

- **International migrants are a significant component** of the regional workforce, from farming, hospitality & tourism, through to health. With critical skills shortages many businesses are having to retract, and in some cases business as usual is proving impossible.

- **There is a human toll on migrant workers and their families** while they wait on news from Immigration New Zealand on their future. There are a range of circumstances for migrants from visa extensions, awaiting partner visas allowing families to be re-united, skilled migrants on pathway to residency, and temporary workers.

- **Responses from our online business survey** via the Chamber and Great South highlighted the key issues and concerns:
    - **Immediate issue is stability for migrant workers** and employers around those on current visas. Providing stability was an issue for employers and their migrant employees currently looking for visa extensions or pathway to residency
    - **The lack of suitable workers available** from a (no longer available) "pool of immigrants" has made trying to fill positions harder and impossible in some sectors. It is difficult trying to recruit New Zealanders with very low or in many cases, no applications
    - **The process itself** –time, costs, effort required for applying for visas or current visa extension is impacting on staff recruitment
    - **Lack of MIQ availability,** and in cases where visas have been approved, often there aren't MIQ spaces available.

Welfare Profile

Welfare Profile

National Welfare update for June 2021

2,847 decrease
in the number of **main benefit** recipients, when comparing June (354,744) with May 2021 (357,591).

1,305 was the yearly increase (353,439).

3,123 decrease
in the number of **Jobseeker Support** recipients, when comparing June (190,257) with May 2021 (193,380).

198 was the yearly decrease (190,455).

11.3 percent
of the estimated New Zealand working-age population received a main benefit as at June 2021.

6.1 percent received Jobseeker Support.

10,632 cancels into work
for all main benefits in June 2021, from 10,881 in May 2021.

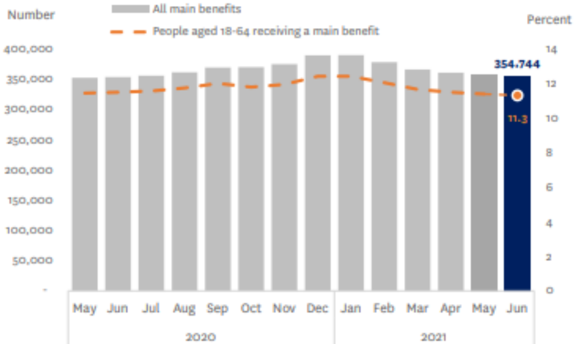
7,518 cancels into work in June 2020.

Main benefits

Figure 1. Main benefit categories and sub-categories

	May 2021	June 2021	Annual trend
All main benefits	**357,591**	**354,744**	▼
Jobseeker Support (JS)	**193,380**	**190,257**	▼
Work Ready (JS – WR)	114,357	110,790	▼
Health Condition and Disability (JS – HCD)	79,026	79,467	▲
Sole Parent Support (SPS)	**66,066**	**65,967**	▼
Supported Living Payment (SLP)	**94,533**	**94,704**	▲
Health Condition and Disability (SLP – HCD)	85,419	85,596	▲
Carers (SLP – Carers)	9,117	9,108	▼
Youth Payment/Young Parent Payment	**1,374**	**1,359**	▼
Youth Payment (YP)	129	144	▲
Young Parent Payment (YPP)	1,245	1,215	▼
Other main benefits	**2,235**	**2,460**	▲
Emergency Benefit (EB)	1,362	1,386	▲
Emergency Maintenance Allowance (EMA)	672	687	▲
Jobseeker Support Student Hardship (JSSH)	201	387	▲

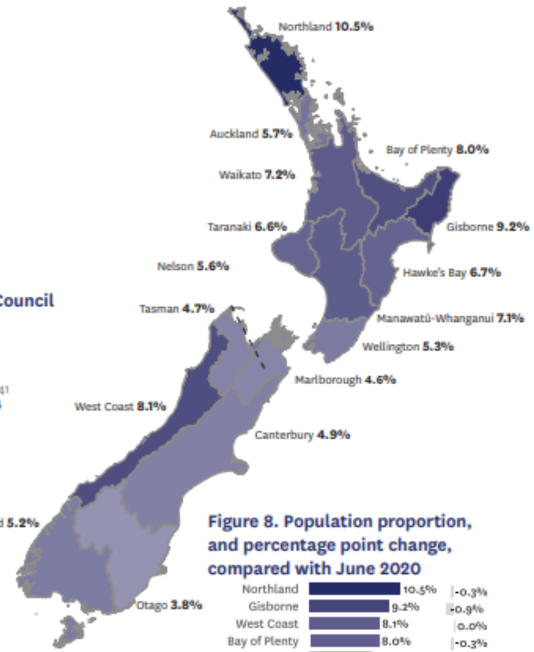
Figure 2. All main benefits, timeseries



ⓘ From 12 February 2021, the Ministry of Social Development is applying a range of new confidentiality procedures to public data releases. These procedures will continue to protect client information, while making more data available. To find out how we have changed the way we work with client information visit: https://www.msd.govt.nz/about-msd-and-our-work/tools/how-we-keep-data-private.html

ⓘ Unless otherwise noted, monthly numbers presented in this document are as at the end of the month and clients reported on are working age (i.e. aged 18–64).

Figure 7. Population proportion of 18–64 year olds receiving Jobseeker Support, by Regional Council



Jobseeker Support – Work Ready, by Regional Council and ethnicity

Figure 3. JS – WR by Regional Council (total)

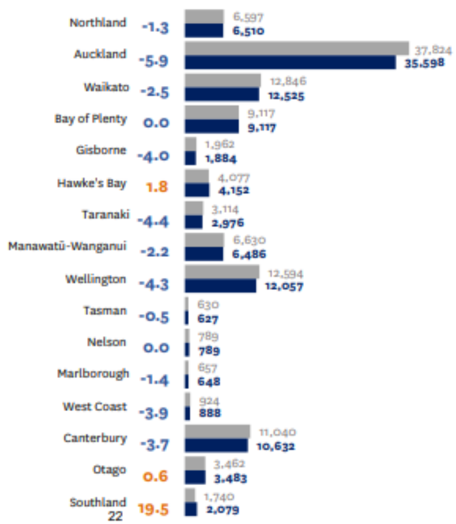


Figure 4. JS – WR by Regional Council – Māori

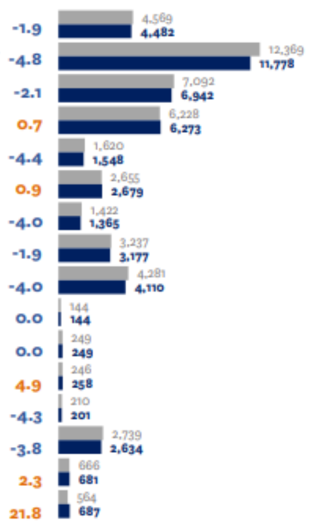


Figure 5. JS – WR by Regional Council – NZ European

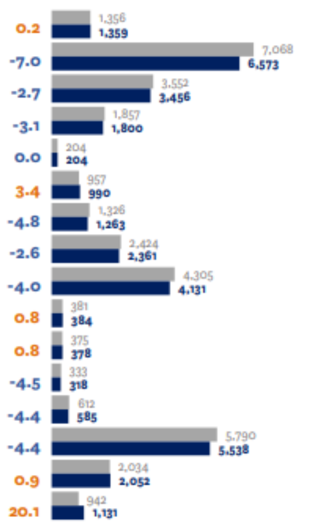


Figure 6. JS – WR by Regional Council – Pacific peoples

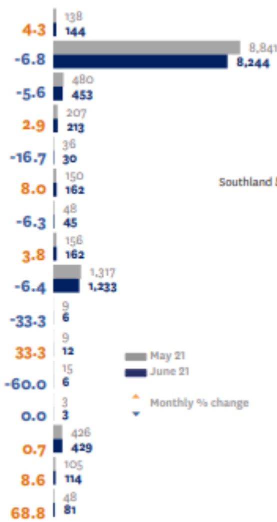
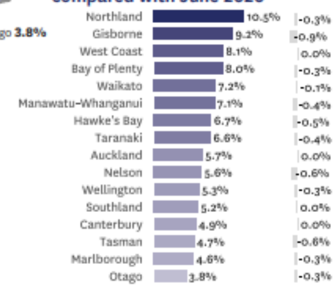


Figure 8. Population proportion, and percentage point change, compared with June 2020



Welfare Profile

National Welfare update for June 2021

Jobseeker Support and Jobseeker Support - Work Ready

Figure 9. Jobseeker Support – Work Ready, by ethnicity

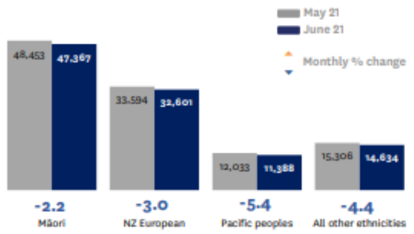


Figure 10. Jobseeker Support, by gender

From 2 December 2019, a "Gender diverse" option was made available for our clients to choose from. We expect the numbers in this category to increase over time.

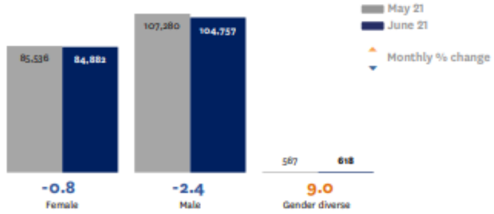
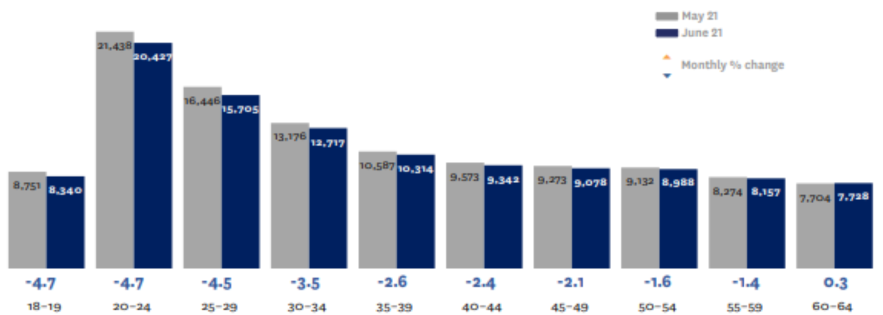
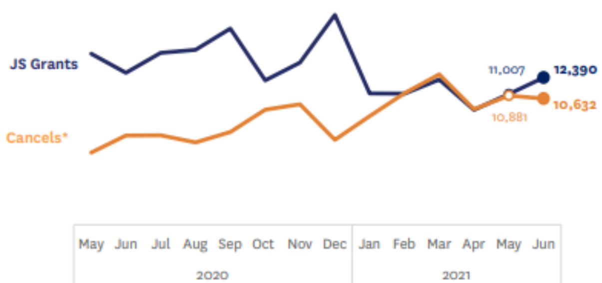


Figure 11. Jobseeker Support – Work Ready, by age groups



Grants and cancellations

Figure 12. Grants for Jobseeker Support, and cancellations due to obtaining work for all main benefits, timeseries



* This includes cancellations of any main benefit due to obtaining work.

Supplementary benefits and hardship assistance

Supplementary benefits and hardship assistance numbers include all clients, not only working-age clients. Benefit Advances and Special Needs Grants (SNGs) are the sum of grants in the month. The sum of Special Needs Grants also includes Food SNGs.

Figure 13. Supplementary benefits

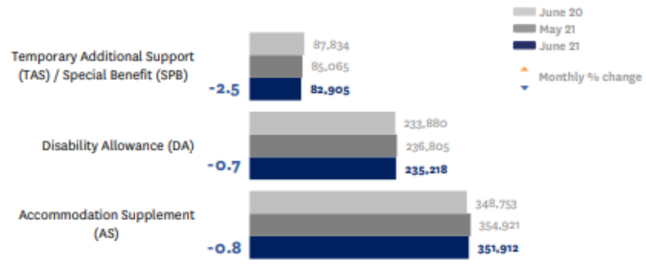


Figure 14. Hardship assistance

Figure 15. Special Needs Grants granted for food, by Regional Council

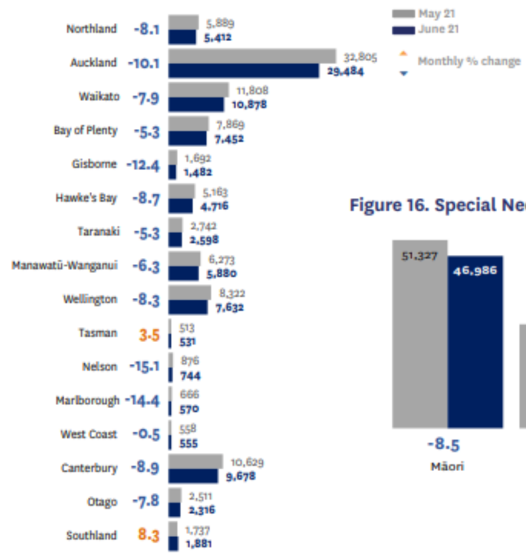
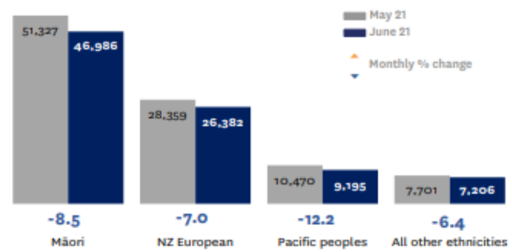


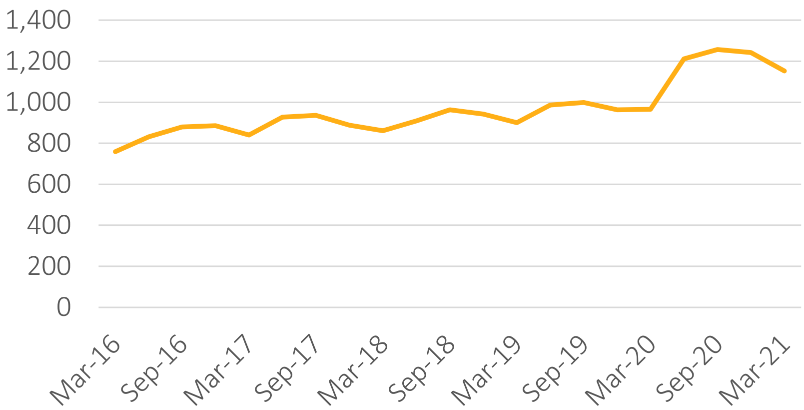
Figure 16. Special Needs Grants granted for food, by ethnicity



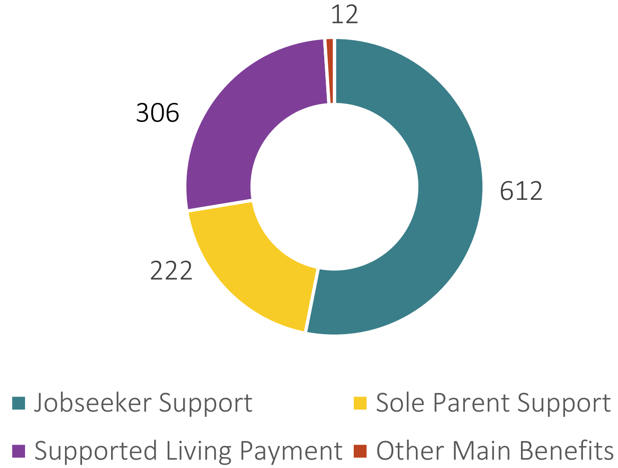
Welfare Profile

Southland Welfare Profile

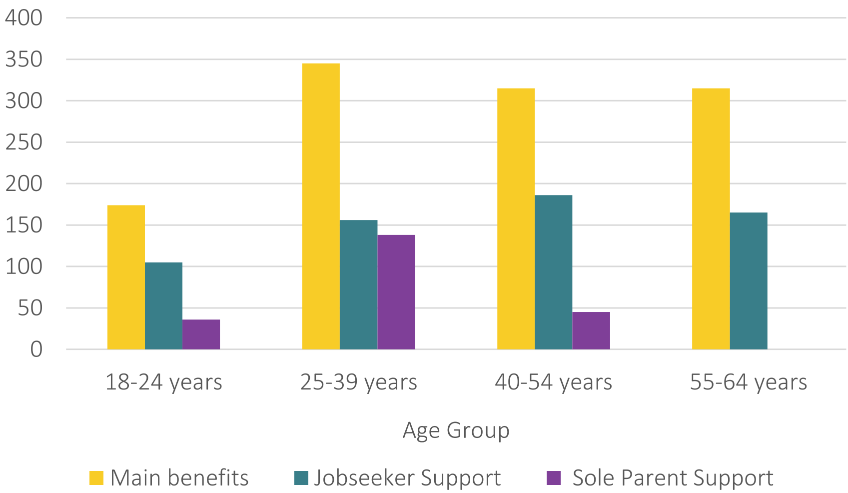
Southland District (All Benefits) - March 2012-2021



Southland Benefit Numbers, by type, March 2021

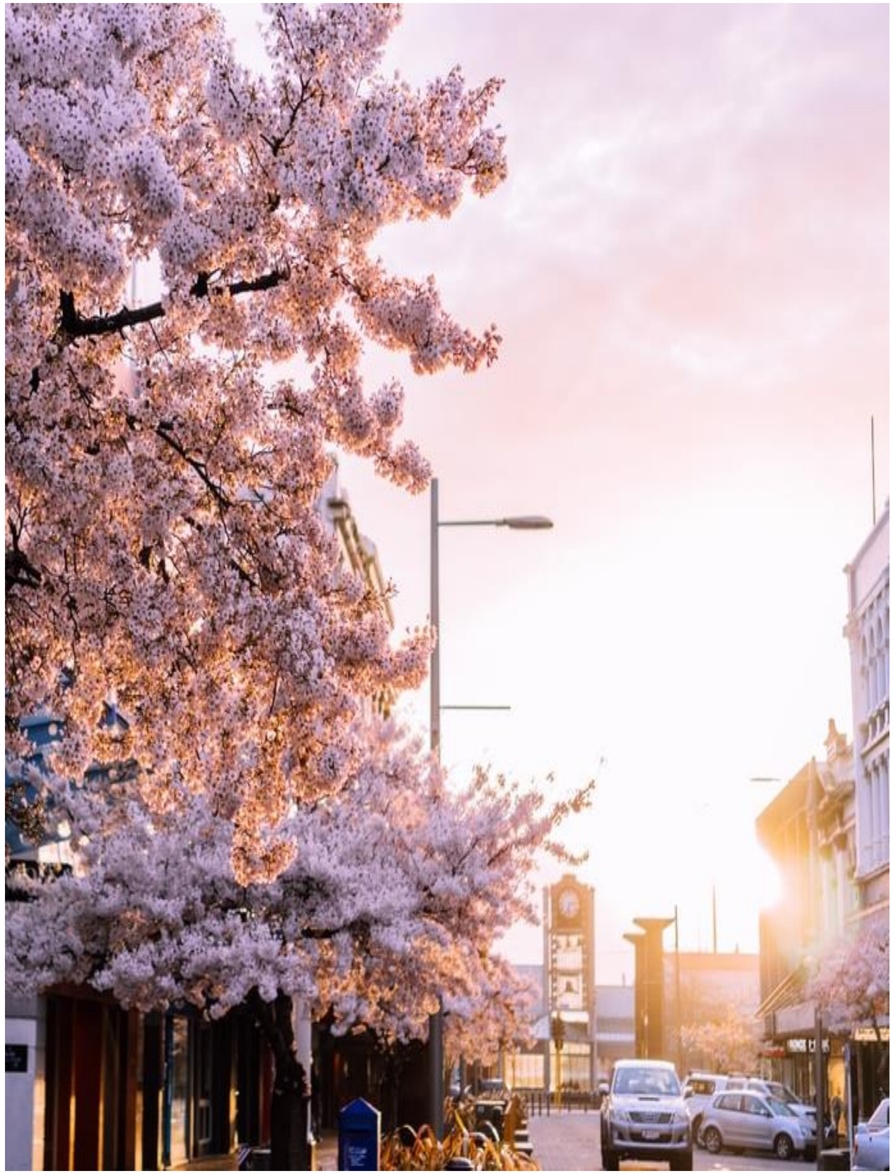


Age profile of working-age recipients of benefits In Southland - March 2021



- Benefit Recipients were 759 in March 2016, which has **increased to 1,152 in March 2021**
- **Peak increase in benefit recipients coincides with 2020's Covid-19 Alert Level 4 lockdown period**. Southland has not returned to pre-Covid-19 levels of beneficiaries due to the ongoing impacts of intermittent lockdown periods and other restrictions on work
- **Approximately 1.5% of Southland's population** was receiving a benefit as of March 2021
- **Jobseeker support has the highest number of recipients for 2021**, an ongoing consequence of the Covid-19 pandemic
- **The 25-39 years cohort** has the highest number of Sole Parent Support recipients; they also **have the highest number of benefit recipients in general.**

Regional Enablers and Barriers



Enablers and Barriers to the Labour Market

At a glance

BARRIER: An obstacle that stands in the way or prevents and individual from being able to join the labour market, or employers accessing employees.

LABOUR MARKET CONSIDERATION

TRENDS

- Technological change
- Population and demographic change
- Climate change and impacts from natural disasters such as drought/flooding/earthquakes
- Industry and economic structures – such as?
- Potential and desired changes to key regional sectors
- Changes to how work and employment are structured

IMPLICATIONS

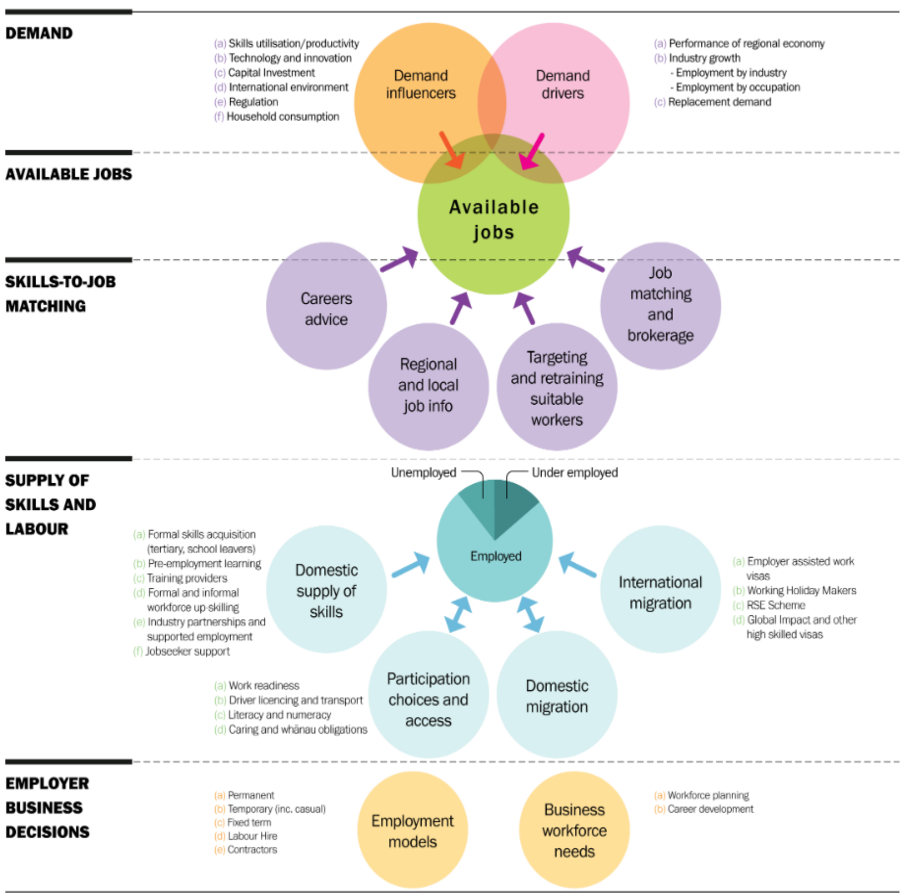
- How could the types of jobs available and the types of skills required change?
- How could key sectors and dominant firms/employers change, grow or decline in importance, or shift to different regions
- How will identified priority groups and those typically under-represented fare?
- Where will workers come from, what skills with they have, and will this meet the region's needs?

BARRIERS

What distinguishes long-term beneficiaries from others is not the presence of any one significant barrier, but the presence of a cluster of barriers and, a history of disadvantage or negative life events. Typically barriers cluster according to whether they involve physical/mental barriers, work/education barriers or family barriers. Barriers can include, but not limited to:

- Physical/mental
  - Substance abuse and dependence
  - Mental illness and psychological distress
  - Disability or injury
  - Physical fitness
- Work/education
  - Low education
  - Low skill level
  - Little/no work experience
  - Working conditions
- Family/personal
  - Housing availability and prices
  - Caring responsibilities
  - Health and learning disabilities
  - Lack of drivers licence

A labour market is the place where workers and employees interact with each other. In the labour market, employers compete to hire the best, and the workers compete for the best satisfying job. – *The Economic Times, 14 May 2021*



Barriers and enablers are felt unequally by different demographic and geographic groups within a region – what we have however provided is a generic overview, where the inequalities have not been explicitly noted.

ENABLER: An enabler is something (often an initiative) that enables or facilitates someone (or a group) to do something. Enablers can be people, systems, processes or innovation that breaks up complexity to ease the navigation of barriers.

ENABLER PROVIDERS

Who is providing the enablers?

- Government
- Industry
- Community
- Iwi
- Individuals/family

Enabler groups:

- National
- Regional
- Industry specific
- Age specific
- Immigrant specific
- Group or cohort specific

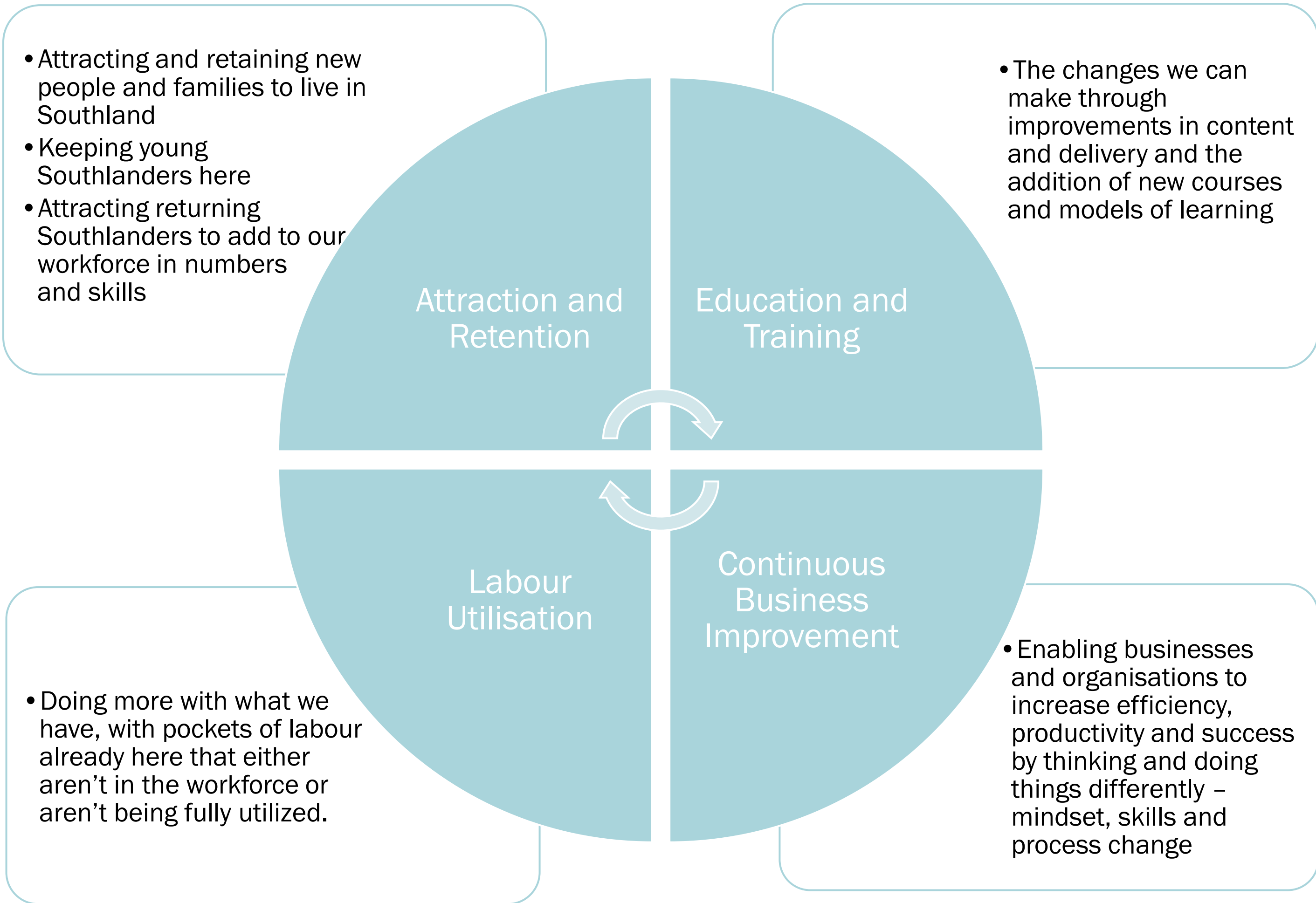
ENABLERS

Enabling someone can include the provision of guided support in order to achieve a goal or objective which allows for greater labour market participation.

- Employer
  - Flexible working arrangements
  - Worker support (placement and in work)
  - Transport support
- Government
  - Free trades training / fees subsidy – fees free
  - financial / housing support
  - Social procurement
- Family/personal
  - Money
  - Transport
  - Family support
  - Stable and safe accommodation
- Education
  - Secondary and tertiary education
  - Vocational or career advice & guidance
  - Education and training in prisons
  - On the job training
  - Links/partnerships with employers or other groups

Enablers and Barriers to the Labour Market

Solutions pathways to consider



Snapshot of Key Strategic Plans and Initiatives

Snapshot of New Zealand Wide Key Strategic Plans and Initiatives

Regional Economic Development Briefing for the Incoming Minister (BIM)	The BIM outlines how central government can support New Zealand's Regions to achieve their potential. By tailoring responses to the particular needs of people and the places that they live in, government can improve the prosperity and living standards of New Zealanders. https://www.beehive.govt.nz/sites/default/files/2020-12/Regional%20Economic%20Development.pdf
Regional Public Service Priorities	In 2019, the government announced reforms to modernise the New Zealand Public Service, including how the Public Service works in the Regions (e.g. more joined up government services; agency boundaries more aligned with communities). This ongoing work is intended to enable central government agencies to work together in a more joined-up way to support Regional and local government and community leaders on agreed priorities for the wellbeing of local communities. Cabinet paper on reform: https://www.publicservice.govt.nz/assets/Legacy/resources/Joined-Up-Approach-to-the-Regional-Arm-of-Government.pdf
Employer-Assisted Temporary Visa (EATV) review	The review of the EATV began in late 2018 and involved: • strengthening the labour market test for work visas to ensure that migrants are not being used for jobs New Zealanders can do, and • making skills shortage lists more Regionally focussed so that migrants work where there is a genuine shortage and the differing needs and circumstances of Regions are taken into account. https://www.mbie.govt.nz/dmsdocument/3714-cabinet-paper-a-new-approach-to-employer-assisted-work-visas-and-Regional-workforce-planning
Reform of Vocational Education (RoVE)	RoVE began at the end of 2018 and aims to build a unified vocational education system, with learners at its centre, that New Zealand's workforce is fit for industries' needs both now and in the future. RSLGs are one of the seven key changes under RoVE (others can be seen via the link below) and bring the Regional perspective, to complement the industry input from Workforce Development Councils, in advising TEC's decision-making. https://www.tec.govt.nz/rove/reform-of-vocational-education/
Tertiary Education Strategy (TES)	The TES sets out the Government's priorities for education that will ensure the success and wellbeing of all learners. It is a statutory document issued under the Education and Training Act 2020 that directs government and education sector activities towards the actions that will make the biggest difference. https://education.govt.nz/our-work/overall-strategies-and-policies/the-statement-of-national-education-and-learning-priorities-nelp-and-the-tertiary-education-strategy-tes
Employment Strategy	The Employment Strategy presents the Government's vision for the labour market and the changes it is implementing to improve employment outcomes for all New Zealanders, in line with its PSI economic priorities (see Industry Strategy box below). https://www.mbie.govt.nz/dmsdocument/6614-our-employment-strategy-everyone-working-to-deliver-a-productive-sustainable-and-inclusive-new-zealand
Population employment action plans (EAPs)	A key focus of the Employment Strategy is to create more inclusive employment outcomes, a key tool in achieving this is a series of Action Plans focused on improving outcomes for): Youth; Māori; Pacific Peoples; Disabled Persons; Older Workers; and, Refugees, Recent Migrants and Ethnic Communities. https://www.mbie.govt.nz/business-and-employment/employment-and-skills/employment-strategy/
Industry Strategy	The Industry Strategy outlines the government's approach to industry policy and its "PSI" economic priorities of lifting Productivity, Sustainability and Inclusivity within New Zealand's key sectors. https://www.mbie.govt.nz/dmsdocument/11570-a-refreshed-industry-strategy-in-response-to-covid-19-proactiverelease-pdf
Industry Transformation Plans (ITPs)	ITPs are a core tool within the Industry Strategy and bring together all relevant parties around an industry of focus to agree a long-term vision for the industry and identify the actions that can be taken by the industry, government and others to realise this vision. • Six sectors have been identified for ITP development based on either their need for support in transition (in response to COVID-19 and long-term challenges such as the shift to a low emissions economy) and/or their existing comparative advantages. These are Construction; Agritech; Digital technologies; Food and beverage manufacturing; Forestry and wood processing; and Advanced manufacturing. https://www.mbie.govt.nz/business-and-employment/economic-development/industry-policy/

Snapshot of Southland's Regional Plans and Initiatives

Key Regional Plans

Murihiku Regenerate 2020

Vision: Our four Murihiku Papatipu Rūnanga - are individually strong, collectively enabled and driving Rūnanga and Regional aspirations that will sustain our lifestyles in a thriving, healthy environment for our generations to come. To achieve this, the plan will activate Mana whenua as the basis for the regeneration approach - working at a mana to mana level with the Crown as a partner, and then with all levels of leadership within Murihiku.
https://www.youtube.com/watch?v=eaA8iEnYVZo

Southland Regional Development Strategy 2015 (SORDS)

The Southland Regional Development Strategy was initiated by the Southland Mayoral Forum in late 2014 with the simple goal of 10,000 more people living in Southland by 2025. The strategy was to unify regional development and look at levers for economic and social development, providing a clear plan of action. SORDS is penned for review in 2021 as part of Southland's Just Transition planning.
https://www.sords.co.nz/

Bluff Motupōhue Draft Tourism Master Plan

Great South, along with Te Runanga o Awarua and Invercargill City Council, has facilitated the development of the Tourism Master Plan which provides concepts for the future development of Bluff as a jewel in the crown of the Southland region. The ultimate aim of this Master Plan is to transform and revitalise Bluff to make it a more attractive place to live, work, play, visit and invest in.
https://greatsouth.nz/storage/app/media/Publications/GREAT-SOUTH_BLUFF-TOURISM-MASTER-PLAN_2020_FINAL_REDUCED-WEB.pdf

Southland Workforce Strategy 2014-2031 – Update 2021

This Workforce Strategy Update (2020) is intended to assess, update and extend the population, labour market and labour force analysis contained in the 2015 Strategy and 2014 Labour Market Assessment; evaluate key elements of the previous Strategy, and provide a 'pre-Covid' baseline against which post-Covid population, labour market and labour force changes can be assessed.
https://greatsouth.nz/storage/app/media/Publications/cropped-images/Southland%20Workforce%20Strategy%20Update_Natalie%20Jackson.pdf

Thriving Southland

Mission: For the Southland community to work together for a better future for all. Protecting Southland's prosperity, heritage, environment and health through community collaboration.
https://www.thrivingsouthland.co.nz/

Fiordland (Te Anau) Community Board Strategies

Industry plans

Districts Community Strategies

Snapshot of Southland's Regional Plans and Initiatives

Key Regional Plans

Environment Southland Draft LTP 2021-2031

The Council's priority work programmes focus on four specific areas. These include improving freshwater quality and implementing the Government's requirements; completing shovel ready projects to improve flood defences in a co-funding arrangement (Government 75%; Council 25%); upgrading our systems to ensure our large volume of data more effectively helps the Council and Southlanders to make good decisions; continuing our coastal marine activities – harbourmaster, coastal planning and biosecurity. The long term plan will be adopted mid-2021.
https://www.haveyoursay.es.govt.nz/long-term-plan

Gore District Council Draft LTP 2021-2031

Over the next 10 years Gore aims to maintain steady growth of our District's population; sustain the wide range of economic, recreational and social opportunities that contribute to Rural City Living; ensure rates affordability and user-pays Council services; and build stronger relationships with Iwi. Adoption of the 10 year plan will occur late June 2021.
https://lets.talk.goredc.govt.nz/ready-to-grow-our-2021-2031-10-year-plan

Southland District Council LTP 2018-2028

The plan describes the activities and service levels Council intends to provide and sets out the accompanying budgets. It also highlights key issues the District is facing and the strategies intended to address these. SDC is now working on their 2021-2031 Long Term Plan.
https://www.southlanddc.govt.nz/assets/Uploads/SDC-Final-LTP-2018-2028-Entire-Document-Web-Version.pdf

Invercargill City Council Draft LTP 2021-2031

Council is working on a roadmap to renewal which will form the core of its strategy for the next ten years as it works to build a city with heart. Council has completed its consultation and submission process on the preferred options for some of the big-ticket items and how Council will pay for them. The final decisions for the Long-term Plan will begin in July 2021.
https://icc.govt.nz/roadmaptorenewal/

Ready for Living Strategy – Gore

Eastern Southland's population is steadily ageing – in 2017, 41% of Gore District's population were aged over 50.
Proactive attention to this fact now will ensure that Eastern Southland remains a great place to live for all ages. Older people bring enormous value to the community in many ways. This project will ensure that barriers to their participation are minimised so the benefits of Rural City Living are enhanced, maximised and enjoyed by all ages.
https://readyforliving.co.nz/about/

Ready for Growth Strategy – Gore

Ready for Growth is a community-led development strategy for the Gore District. Its overall objective is to grow the Gore District's population by 1500 people by 2030. To date, Ready for Growth has provided a strategic context for the development of significant socio-economic projects, particularly where those projects have relied on applications for external funding.
https://www.goredc.govt.nz/our-district/economic-development/ready-for-growth-a-development-project-for-the-gore-district/

Snapshot of Southland’s Regional Plans and Initiatives

Key Regional Labour Market Initiatives

Community Networking Trust (Eastern Southland) Incorporated - Hokonui Highway Project is an initiative aimed at generating shared community responsibility to ensure tamariki and rangatahi in the Gore District have the skills and wellbeing necessary to transition seamlessly into training and employment.

Adventure Southland - Limited Service Volunteer (LSV) is a voluntary and free 6-week training course, run by NZDF and supported by others, including Police. The programme supports young people to build confidence, earn NZQA credits, and learn new skills.

Southland Regional Development Agency Limited - Southland Youth Futures focusses on developing partnerships with educators, employers, training providers, ITOs and industry advocacy groups to assist young people into training and/or employment before they leave the education sector.

Adventure Southland Limited Invercargill ALIVE 9 Week Youth programme for 18-24 year olds. Confidence building and mentoring with work focused interventions to pathway clients into employment. Includes 2 week outdoor residential programme at Borland Lodge, as well as pastoral care.

Youth Service (NEET) - Comcol NZ engage and support eligible NEET16 and 17 year olds (and some 15-year olds), or those at risk of becoming NEET, to achieve sustained education, training, work-based learning or employment outcomes.

Youth Service (Youth Payment & Young Parent Payment), Comcol NZ engage and support young people (16-19y/o) to achieve improved well-being through education, training, work-based learning, employment outcomes, and reduce risk of long-term benefit dependency.

Mayors Taskforce for Jobs (MTFJ) is a nationwide network of New Zealand’s Mayors, working together towards the vision of all young people under 25 being engaged in appropriate education, training, work or other positive activity in their communities.

The Young Men's Christian Association (YMCA) of Invercargill delivers youth development opportunities that focus on leadership and/or mentoring and/or volunteering, for young people aged 12 to 24 years.

Mīharo Murihiku Trust contribute to youth development initiatives involving mentoring, volunteering, and leadership alongside corporate and philanthropic partners. They promote youth engagement, participation and leadership.

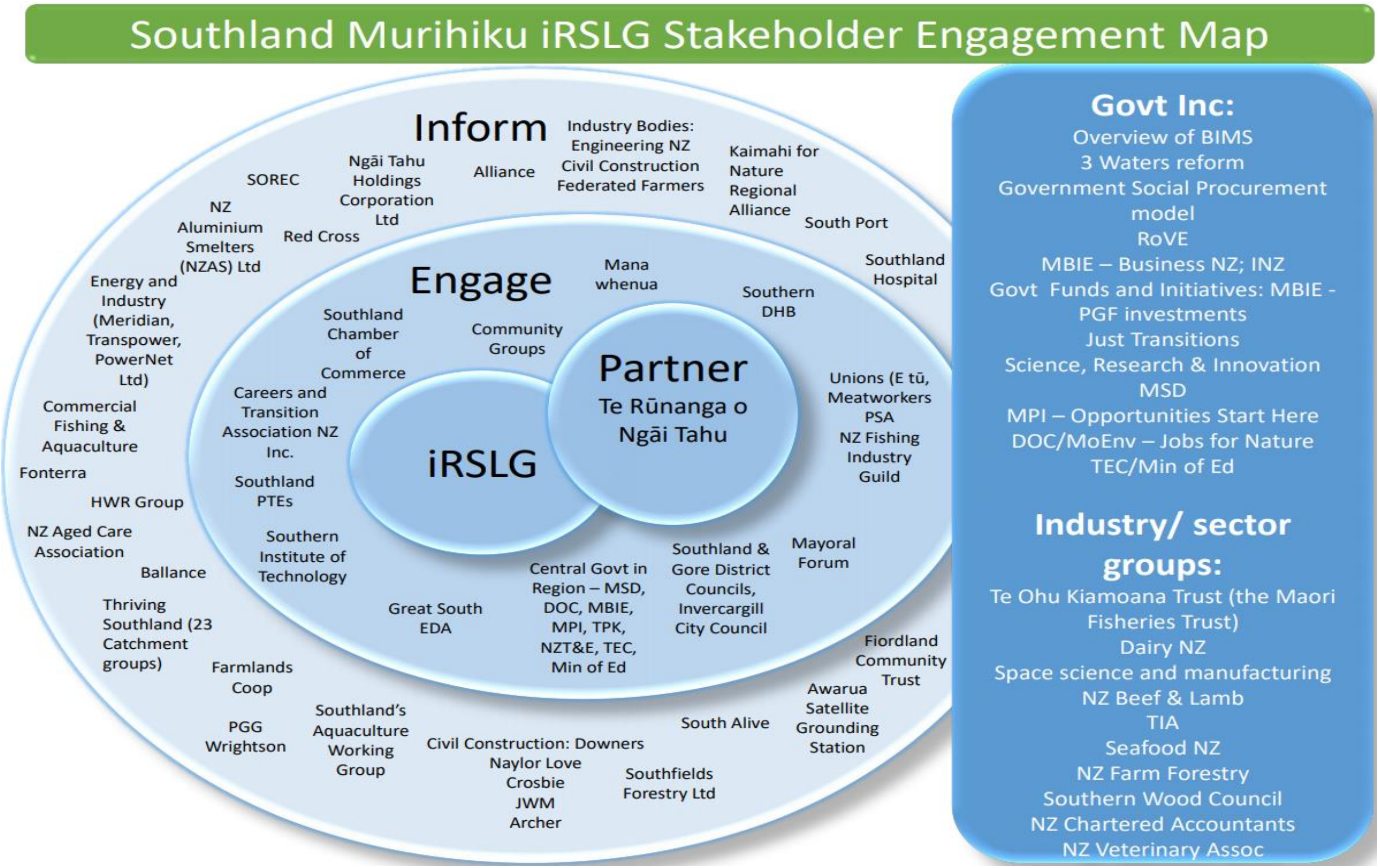
Southland Youth One Stop Shop Trust Invercargill Youth Development provide support to develop and/or enhance young people’s leadership, governance and decision-making skills and experiences.

MSD funding (Southern) to Halberg Foundation: Youth Development Specialist Programmes and Services work with physically disabled young people and their families to get them involved in sports and recreation.

Youthline Southland provide information and advisory services, available to the general public. Their work is community focussed and aims to nurture mental wellness in young people and to prevent and reduce the occurrence and community harms of suicide.

Snapshot of Key Stakeholders

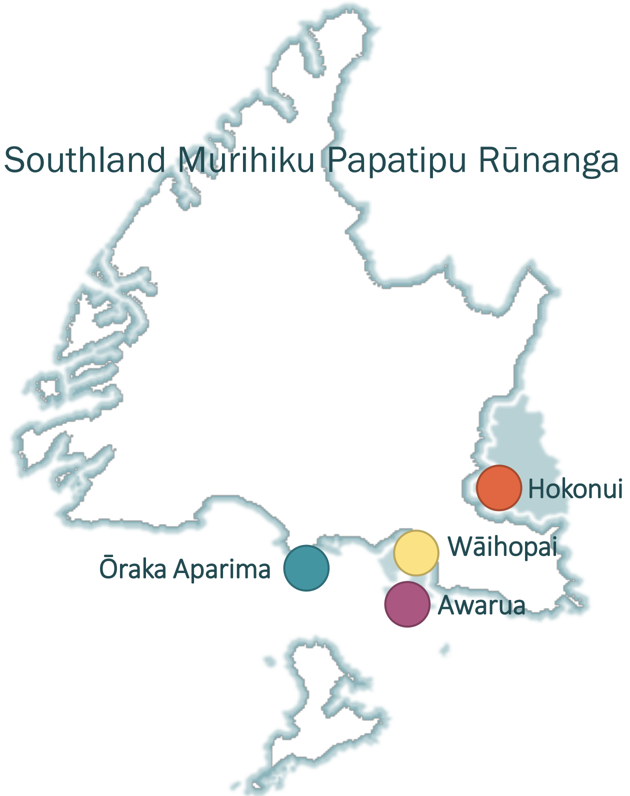
Key Regional Stakeholders



Key Regional Stakeholders

Southland - Te Rūnanga o Ngāi Tahu

Southland Murihiku Papatipu Rūnanga



Te Rūnanga o Ngāi Tahu

Mo tātou, ā, mō kā uri ā muri ake nei –

for us and our children after us.

Te Rūnanga o Ngāi Tahu (Te Rūnanga), the tribal council, was established by the Te Rūnanga o Ngāi Tahu Act 1996 to be the tribal servant, protecting and advancing the collective interests of the iwi.

The design of Te Rūnanga embraces our cultural traditions. It incorporates the best corporate governance models we could find in the world and draws from the democratic structures of local government and Western best practice.

The initial asset base of Te Rūnanga was largely derived from the assets of the Ngāi Tahu Māori Trust Board and from the settlement of Te Kerēme – The Ngāi Tahu Claim (claims against the Crown for various breaches of the Treaty of Waitangi). The financial settlement amounted to $170m plus some interest and commercial opportunities and was received in late 1998. It also subsequently involved fisheries and aquaculture assets valued at $71m.

Since the time of settlement the asset base has grown from approximately $10m in 1996 to over $658m as at June 2012. Over that time Te Rūnanga has made distributions and invested over $254m in tribal development, much of that being direct to our Papatipu Rūnanga and tribal members through a matched savings programme, education scholarships and grants and the like.

One of the principles of our Charter is that the assets of Ngāi Tahu must be managed separately from the bodies that spend and distribute the income earned from those assets. As such, the executive functions of Te Rūnanga are carried out by the Office of Te Rūnanga which manages the representational activities, protects the rights of Ngāi Tahu Whānui and delivers social and cultural programmes. Ngāi Tahu Holdings Corporation manages commercial activities and assets.

Te Rūnanga has an intergenerational investment framework designed to ensure a steady and sustainable cashflow based on profit and capital growth matching its intergenerational tribal development strategy. It includes stringent benchmarking, spending rules as well as a strategic asset allocation framework.

Annually Te Rūnanga issues Letters of Expectation to the Office of Te Rūnanga, Ngāi Tahu Holding Corporation and Whai Rawa which set out general and specific expectations regarding activities and performance. In response these business units develop detailed Statements of Corporate Intent setting out how they will fulfil those expectations. The development strategy of Te Rūnanga is aligned to a tribal distribution strategy. This sets in place an overall strategy for the tribe's investment future, commercially as well as in our people and tribal development. Ultimately Ngāi Tahu invest to create the future we want for our tamariki (children) and mokopuna (grandchildren).

Key Regional Stakeholders

Southland Murihiku

There are four Papatipu Runanga in Murihiku

The takiwa of **Te Rūnanga o Ōraka Aparima** centres on Ōraka (Colac Bay) and extends from Waimatuku to Tawhititarere sharing an interest in the lakes and mountains from Whakatipu-Waitai to Tawhititarere with other Murihiku Runanga and those located from Waihemo southwards.

Awarua Rūnanga, Te Rau Aroha Marae, is the world's southern-most marae. Located in the small town of Bluff, the marae was originally established in the late 1800s as a hostel for local Māori who lived on islands off the Southland coast.

The marae was developed in 1985, but the tīpuna whare, Tahu-pōtiki, which takes its name from the ancestor (tīpuna) of the local tribe, Ngāi Tahu, was opened in February 2003.

Hokonui Rūnanga is one of 18 rūnanga (local councils) of Ngai Tahu (South Island iwi), and is the only one located inland. Established in 1987, Hokonui Rūnanga was established to provide well-being for members through the guidance and management of members spiritual, cultural, educational, moral, social and economic needs. Hokonui Rūnanga exist to ensure a safe and secure future for our next generations.

Hokonui Rūnanga currently has about 14,000 members. Members are represented by up to 24 Executives of the Hokonui Rūnanga Incorporated Society. The Executives oversee the running of the Rūnanga's main areas of interest.

The people of Hokonui have grown this organisation from humble beginnings to it's current capacity delivering a range of whanau services and building spiritual, cultural, social and economic growth.

Te Rūnanga o Waihōpai is based in Southland with Murihiku Marae situated in Invercargill.

The wharekai, Hine o te Iwi, was the first building on the site when it opened in June 1983. The wharenui, Te Rakitauneke, opened in February 1990. Murihiku connects ancestrally to nga waka Uruao me Takitimu, maunga Takitimu and the Te Moana Ara a Kiwa.

Te Tonga o te Whetu, which is the office block, was the first building on the marae complex.

Key Regional Stakeholders

Southland

Key Regional Stakeholders

Great South is our local Regional Development Agency and we have continue to work collaboratively with the team to share data and information relevant to labour market, tourism and business.

Southland Chamber of Commerce continues to work closely with the iRSLG. We are currently look at collaboration on an "Attraction and Retention" project that will benefit the region and will supply valuable insight to the Regional Work Force Plan. (RWP)

Te Anau is a sub-region that has been highly impacted by Covid-19. iRSLG meets with local key Te Anau stakeholders once a quarter and are also supported by Glyn Saunders who is the **Fiordland Employment & Resource Planner** employed by Great South. We are also fortunate to be in regular contact with the local Te Anau Community Board and Chair

Key Industry Stakeholders

Agriculture continues to be the backbone of the New Zealand economy, and the driving force of the Southland economy. iRSLG is fortunate to have members from the Agriculture industry and the Meat Workers Union which gives us a strong representation in this area. We have excellent relationships with Dairy NZ and are in frequent communication with the Southland representatives.

The largest non-agricultural manufacturing business in Southland is the **Tiwai Aluminium Smelter.** The past year was a very uncertain time for Tiwai with the announcement of potential closure.

Local Government Stakeholders

There are four local government councils within Murihiku. Councils also operate under other local government legislation, which sets out specific responsibilities for functions and activities to be delivered locally. iRSLG have regular contact with the local councils through the Mayoral Forum. This consists of all four Mayors, Deputy Mayors and Chief Executive Officers.

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