

# **THE WAIARIKI ROHE**

**THE REGIONAL STATEMENT  
OF  
NEEDS, GAPS, FUTURE TRENDS AND PRIORITIES  
FOR  
THE TERTIARY EDUCATION SECTOR  
IN  
THE WAIARIKI REGION**

**May 2007**

## **Purpose of this document**

This document describes the Needs, Gaps, Trends and Priorities which apply to tertiary education and training within the Waiariki Region of New Zealand.

The document has been facilitated by Waiariki Institute of Technology, as the recognised public sector, regional tertiary provider (ITP). Waiariki has been assisted in drawing up the document by volunteers from a broad spectrum of regional stakeholders (appendix 1): it is therefore to be read as The Regional Statement, prepared by members of the region, not as a Waiariki Institute of Technology document. It has been prepared in response to a request from the Tertiary Education Commission, as a new role for the Institute, responding to the government's Tertiary Educational Reforms.

The document presents a "High Level" overview. It does not include all niche employment sectors or detailed training needs at operational level. Where niche training areas are not captured, organisations should find that they come under an inclusive generic "umbrella". We welcome comment which may improve, either the process, or the content of this document in subsequent years.

The information, in the pages which follow, has been drawn from a series of eight regional consultation meetings held during April and May 2007 across the Waiariki region. This is supported by data provided by national, regional and local government, including Census 2006. The final document incorporates views which were received from a variety of national and local providers and stakeholders following publication of a consultative draft, from mid May 2007. Contributing organisations and individuals, at the time of completion of the task requested by TEC, are listed in appendix 2. The writers are given in appendix 1.

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May 30<sup>th</sup> 2007

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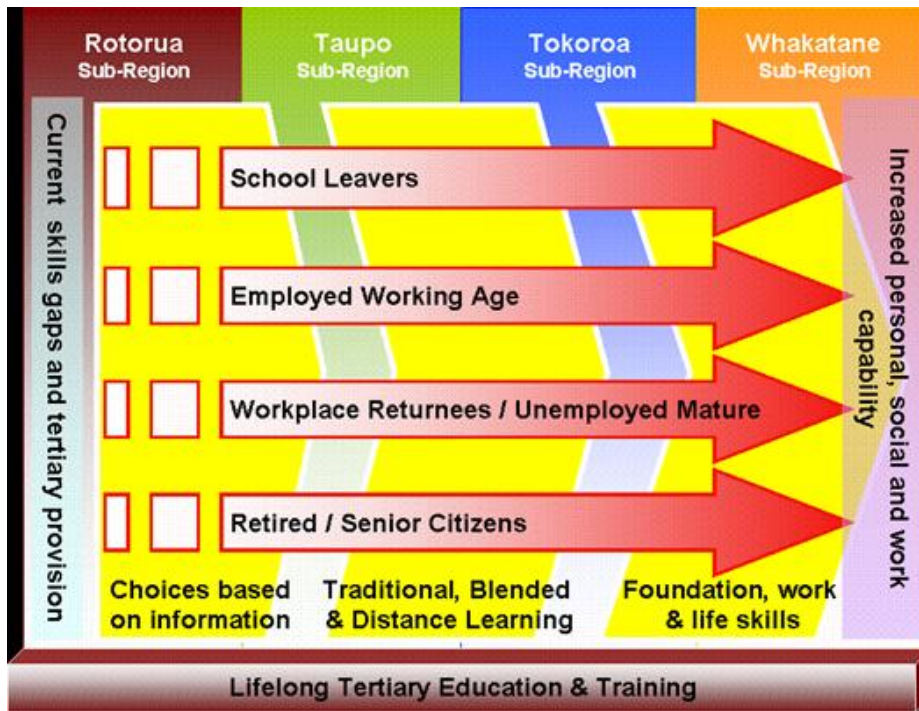
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### Regional workshop in Whakatane



### The Tertiary Network of Provision for Wairiki Rohe



<b>Purpose of this document .....</b>	<b>i</b>
<b>Structure of the Report .....</b>	<b>iv</b>
<b>Executive Summary.....</b>	<b>v</b>
<b>1. The Waiariki Tertiary Region .....</b>	<b>1</b>
<b>2. Current Regional Needs .....</b>	<b>2</b>
2.1 Demographics.....	2
2.2 Ethnic Considerations .....	2
2.3 Social Considerations .....	3
2.4 Health .....	4
2.5 Employment.....	4
2.6 Main Economic Sectors .....	5
<b>3. Regional Needs and Gaps .....</b>	<b>9</b>
3.1 Educational Achievement.....	9
3.2 Skills Gaps .....	10
3.3 Stakeholder and Provider Views .....	11
3.3.1 Government As A Stakeholder – Alignment with STEP and TES .....	11
3.3.2 Tertiary Learners .....	12
3.3.3 Iwi and Māori Trusts .....	13
3.3.4 Industry Training Organisations (ITOs) .....	14
3.3.5 Business and Employers .....	15
3.3.6 Tertiary Providers .....	16
3.4 The Need for Tertiary Products.....	17
3.5 Regional and Sub-Regional Needs .....	17
<b>4. Matrix of Regional Needs, Gaps, Trends and Priorities .....</b>	<b>20</b>
4.1 Common Themes To Be Met By The Tertiary Sector.....	20
4.2 Distinctive Tertiary Contributions Demanded by Common Regional Sectors .....	21
4.3 Niche Areas Demanded by Sub-Regional Resources.....	25
<b>Appendix 1: The Writing Group .....</b>	<b>27</b>
<b>Appendix 2: Attendance and Contributors to Regional Facilitation .....</b>	<b>29</b>
<b>Appendix 3: References and Documentary Evidence Quoted.....</b>	<b>31</b>

## **Structure of the Report**

This Regional Statement applies to the Waiariki Region for the period 2008 to 2010. It has been written in four main sections.

The first defines the Waiariki Region.

The second presents an environmental scan. It reports on regional demographics, ethnic, social, health and employment considerations followed by a review of main economic sectors across the Regions.

The third section reports regional and national views captured during the facilitation process on needs and gaps within the tertiary sector and its outcomes for the community. It reports stakeholder and provider views and discusses these from the points of view captured from TES-STEP, from tertiary learners, iwi and Māori trusts, Industry Training Organisations, businesses, employers and tertiary providers. This section is completed with a review of regional and sub-regional needs and potential trends in demand to which the tertiary sector must respond.

The fourth and final section summarises the first three sections, in a table of Needs, Gaps and Trends and adds the regional perspective of Priorities related to them. Five generic foundation and common themes are identified, supporting lifelong learning applied to all employment and social sectors. Eight areas are identified for which region wide provision is required to meet identified needs, followed by sub-regional requests identified in the consultation process.

The following executive summary extracts the main points and themes from the body of the document. For those who do not wish to read the entire document, the Summary combined with Section Four is designed to provide an overview of our Region's Tertiary Needs, Gaps, Trends and Priorities, with the balance of the document providing detailed evidence in support.

## **Executive Summary**

1. Waiariki region is currently comprised of South Waikato and much of the Bay of Plenty with a total population of 182,000 excluding metropolitan Tauranga.
2. The region has a largely bicultural population predicted to be 55% European origin, 38-40% Māori and the balance Asian and Pacifica by 2016.
3. Social and Health characteristics relate to the changing demographics as the NZ European population age and the larger Māori families of the last decade move into the workforce, combined with an increasing proportion of wealth being generated through Māori owned assets.
4. Major employment sectors are farming and forestry in primary industry, tourism based upon natural and cultural resources, with a wide range of services, healthcare and social support activities underpinning the welfare of the region and visitor population.
5. Smaller niches are occupied by education and applied research. Emerging sectors include those based round thermal energy and other uses for thermal resources, logistics and product carriage, metal and wood engineering, telecommunications and a full range of associated service sector activities.
6. There are significant differences in sub-regional employment patterns across the region. Urban centres offer substantial and growing employment, while forestry and farming activity is becoming increasingly dependent on new technologies, replacing seasonal manual labour.
7. There are significant skills gaps across many sectors on which the tertiary sector may have an impact.
8. Five common themes were identified to which the tertiary sector as a whole must respond in order to gain increased economic output and greater social cohesion in the region. These are:
  - 8.1 Increased lifelong learning capacity;

- 8.2 Increased Numeracy, literacy and language foundation skills;
  - 8.3 Improved work ethic among the socially and educationally challenged sectors;
  - 8.4 Improved people and communications capability;
  - 8.5 Improved tolerance and respect of multicultural viewpoints supported by increased cultural resources
9. There are significant skills and labour shortages which limit regional output in a wide range of employment sectors and industries. Distinctive tertiary contributions, which are demanded of the training and education sector, as part of the solution to these include:
- 9.1 Forestry, Farming and other Land Based Industries
    - need to keep abreast of moving markets and technologies as well as imparting foundation skills to meet industry needs;
    - need to replace low cost seasonal labour with technology enabled professional employees, as mechanisation progresses.
  - 9.2 Tourism with Hospitality - greater supply of culturally sensitive skilled front line and operational staff.
  - 9.3 Social, Health, Welfare and Law Enforcement/rehabilitation - increased labour resources required for service provision, responsive to changing population demands.
  - 9.4 Education and Training - qualified and experienced staff required to underpin training industry and meet demands placed upon the sector.
  - 9.5 Trade Skills - Local demand is not currently met and changing technology will impact on demand which needs proactive planning for new skills to be embedded.
  - 9.6 Added Value Industries
    - Skilled engineers, construction and service professionals, managers and marketers are increasingly demanded;
    - improved logistics services and communication infrastructure support labour is demanded.
  - 9.7 Best Practice Business Management skills
    - small business need to grow with growing demand requiring management capability;
    - clear rewards and training pathways are needed for managers.
  - 9.8 Geothermal applications

- the region's geothermal resources offer considerable potential for a range of applications which require tertiary level training inputs preceded by up-skilling the tertiary sector itself.

10. Sub-regional demands which reflect differences between resources available to each of the four sub-regions, are also reported to include;

10.1 South Waikato:

- demand from water based industries;
- quality labour to support growing rural retirement sector.

10.2 Eastern Bay of Plenty:

- Land and coastal resource management and planning skills are required;
- Coastal and Maritime opportunities demand specialised maritime ecological and environmental skills;
- Coastal retirement community facilities require support for retirement sectors.

10.3 Taupo

- Renewable and natural energy potential in demand is linked to bio-fuels and thermal opportunity.

10.4 Rotorua

- Training in commercialisation skills for new entrepreneurs is required to support emerging industries;
- A skilled workforce is required for those emerging sectors derived from advanced applied research, with the tertiary sector enabled in advance of industry growth.

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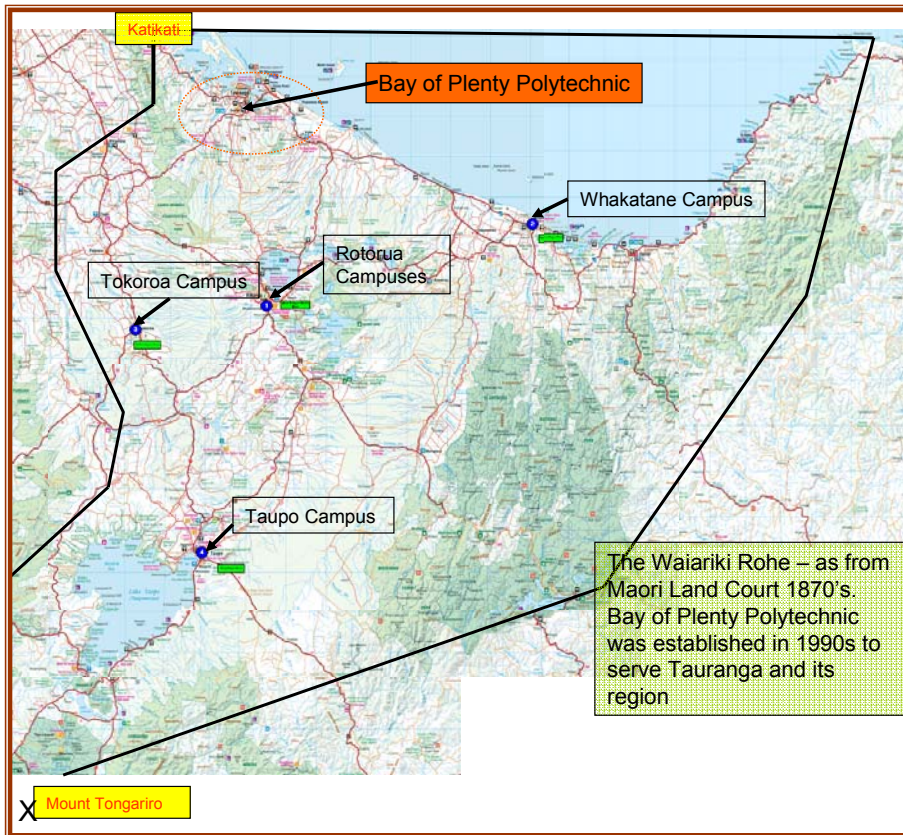
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## 1. The Waiariki Tertiary Region

The Waiariki region is comprised of four main sub-regions. These surround the urban centres of Rotorua, Taupo, Tokoroa and Whakatane. Whakatane region covers the Eastern Bay of Plenty administrative district, Tokoroa the South Waikato District while Rotorua and Taupo align with their regions in name. Within these sub-regions further distinctions can be drawn relating to local historical and tribal characteristics.

The total Waiariki rohe was originally defined by the Māori Land Court in the 1870s as “mai I Maketu ki Tongariro, mai I Nga Kuri a Wharei ki Tihirau, me Te Kaokaoroa o Patetere”: from Maketu on the Coast to Mount Tongariro, from Kati Kati to Mount Tihirau.

Figure 1: The Waiariki Region and Waiariki Institute of Technology Main Campuses



In modern terms, the region is comprised of the Bay of Plenty and South Waikato, excluding the metropolitan city of Tauranga and parts of the Western Bay of Plenty District. Metropolitan Tauranga is served by the Bay of Plenty Polytechnic and local urban PTEs.

## 2. Current Regional Needs

### 2.1 Demographics

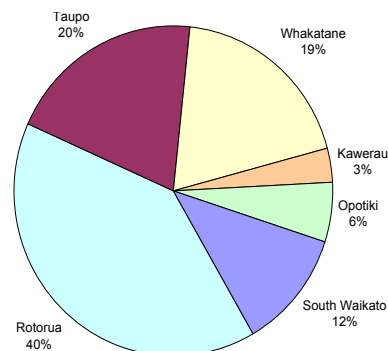
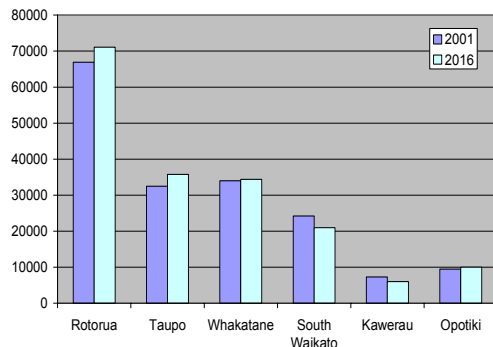
In December 2006, the Waiariki region<sup>1</sup> population was approximately 182,000 of which 36% lived in the Rotorua and 18% in Taupo, 18% in Whakatane and 8.5% in Tokoroa sub-regions. A proportion of Western Bay of Plenty are affiliated to the Waiariki region.

By 2016, the population is expected to increase by 2%, to approximately 186,000. Substantial economic growth will encourage further increase of rural lifestyle seekers and retirement to the western sea border or South Waikato areas. Population may reach 200,000 at the upper limit of projections.

**Table 1: Regional population**

Region and Centre	Population <sup>2</sup>	Region and Centre	Population
<b>Bay of Plenty</b>			
Western Bay	42,078	Opotiki	8,976
Tauranga	103,635	Kawerau	6,921
Rotorua	65,901	<b>Waikato</b>	
Whakatane	33,300	South Waikato	22,641
Taupo <sup>2</sup>	32,421	Western Bay (part only)	12,000
<b>Total Waiariki Region Population at Dec 2006</b>			<b>182,160</b>

**Fig 2: Projected Population Changes 2001-2016**    **Fig 3: Projected Population Distribution 2016**



### 2.2 Ethnic Considerations

The proportion of Māori will have significant impact upon evolving cultural, social and employment activities. By 2016, it is projected that there will be an overall 13.6% increase in Māori, with a decline in Asian and Pacific ethnicities of 8.1% and 7.4% respectively.

The region's overall ethnic composition will comprise some 54-56% European, 38-40% Māori, 2% Asian and 4% Pacifica. Rotorua will provide the highest density urban population centre for Māori, while Opotiki and Kawerau are expected to rise to over 50% Māori.

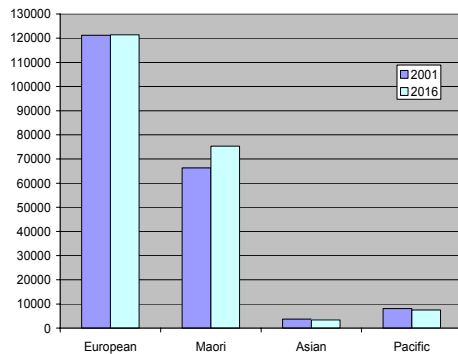
<sup>1</sup> Department of Statistics Report for Census 2006, Number of normally resident population on Census Night 2006. For this Regional Statement the population has been calculated excluding Western Bay of Plenty. However, some of this area is also serviced by Waiariki while Bay of Plenty Polytech also extends its reach in some subjects to the Eastern Bay.

<sup>2</sup> Taupo overlaps with South Waikato but is in the Waiariki Region

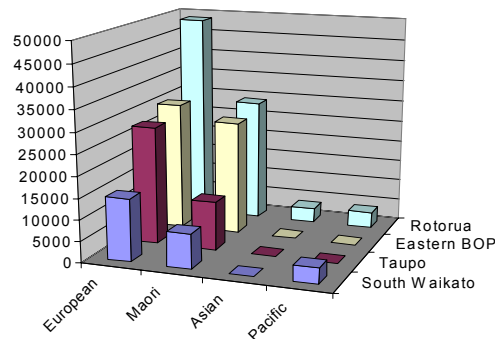
Almost 75,000 Māori are expected by 2016, with the current young large Māori families maturing and moving into the workforce in greater numbers and the traditional white NZ population moving into retirement and later life occupations.

The unique identity of Māori and Pacifica culture means that these population groups generate greater social cohesion than the more open and mixed European ethnicities. Hence although they still form a minority within the total regional community, the impact of this population shift will be considerable in terms of the regional identity.

**Fig 4: Projected Ethnic Population Distribution 2016**



**Fig 5: Projected Ethnic Changes 2001-2016**



Growth of smaller ethnic minorities such as Indian, Chinese, Thai, and Pilipino groups will also impact upon the region, due to greater immigration of professionally qualified people to fill skills gaps, combined with exit of skilled New Zealand born people to Australia and other western societies.

### 2.3 Social Considerations

One-parent families and couples without children are predicted to increase in the near future. Average household size is expected to decrease from 2.8 people in 2001 to 2.4 people by 2016.<sup>3</sup> There are significant rural and urban areas where large family units live in traditional housing and where studies show that high social deprivation standards apply. Social deprivation analyses based on census data<sup>4</sup> reveal differences between the main townships themselves and between them and the semi-rural regions, or between these and the more distinctly rural areas of the extreme South and East, as well as forest hamlets with poor road and communication access.

At the June 2005 quarter, the national average weekly household income from all sources was \$1,260. However, one-parent with dependent children households only received \$537 per week; less than 50% of the average. Financial support from government schemes is highly significant to the low income population. The relatively low income has increased in recent years in some areas. Nevertheless, this still means that youth and skilled labour leaves the area.

Unemployment is higher for Māori, especially young males with poor educational achievement. This group faces a high risk of exposure to criminal activities, particularly through gang affiliations. In addition, the projected higher level of single parent families, in

<sup>3</sup> Statistics New Zealand. *Projected Families and Households by Type and Territorial Authority: Medium Series 2001(Base)-2021*

<sup>4</sup> Statistics New Zealand, [www.stats.govt.nz/urban-rural-profiles/...../social-condition.htm](http://www.stats.govt.nz/urban-rural-profiles/...../social-condition.htm)

low decile areas, will contribute to crime levels. Social support to young Māori rates a high priority in social and iwi development strategies.

Many regional planners and Māori trusts are attempting to break the cycle of a low wage economy. Historically, low wages and a high level of manual hands-on seasonal work have encouraged high staff turnover associated with low cost services. Improved service quality, or added value activity, with commensurate increases in employer income, combined with reduced seasonality, can be expected to encourage a more professional workforce who will be technology enabled. Resulting growth of more permanent employment, hand in hand with more technology based work practices, will also generate greater reward for managerial professional workers, which will impact upon these social and employment characteristics.

## 2.4 Health

Health Studies Advisory groups have indicated a significant deficit of physical and mental health care workers with Māori and Pacifica cultural awareness. There is a recognised shortage of dentists, community nurses, palliative care workers, midwives, general practitioners and many other groups within the health professions. The modest level of professional and care worker qualifications in the Waiariki Region has been identified by the Tertiary Education Commission<sup>5</sup> as well as by local and National DHBs, residents and planners<sup>6</sup>.

Poor nutrition, obesity and lack of fitness are trends that continue to threaten the health of populations regionally, nationally and globally. In the Waiariki region, the high proportion of unfit Māori and Pacifica males and obese young females who smoke, adds additional challenges. A Te Arawa report<sup>7</sup> cites smoking as the second most important priority among health issues, with related low birth weights, poor dental care and asthma issues demanding attention.

The significant increase in NZ European population over the age of 50 in the next ten years will place a greater demand on health and social services, including rehabilitation, health screening and palliative care, adding to the pressures on health services.

## 2.5 Employment

Employment in the Bay of Plenty region, as at December 2006, was 97.9% of the eligible population, and in the total Waikato region was 96.6%. Pockets of unemployment were present in areas such as Kawerau and Tokoroa and in rural hamlets such as Murupara, where primary forestry employment has fallen as employment practices have changed. In migrants a misfit between employment levels and potential economic contribution has been reported, where local recruitment did not recognise overseas qualifications. Rotorua has established a specialist unit within the Economic Development Agency of the City Council to address immigration labour issues.

Te Arawa reported that just over half of all Māori adults in the Te Arawa rohe received personal income from wages and salaries. Māori adults in Te Arawa and Tūwharetoa were less likely to receive income from self employment (6.5%) and investments (6.8%) than Māori adults nationally. There were higher rates of receipt for national superannuation and domestic purposes benefit<sup>9</sup>. The 2006 Census revealed the distribution shown in Table 2.

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<sup>5</sup> Tertiary Education Commission. *Qualifications Supply Analysis – New Zealand Health Sector*. Wellington: TEC.

<sup>6</sup> Fit for Purpose and Practice, Health Workforce Advisory Committee, Medical Reference Group May 2006.

<sup>7</sup> Tukua Mai Kia Piri Te Ārawa E, Te Puni Kokiri, October 2006

Unemployment is more prevalent in sub-regions where historically the population has been made up of a high proportion of indigenous peoples, both in Tokoroa and Kawerau for Pacifica, and in Opotiki and Rotorua with Māori. Te Arawa (Rotorua), Ngāti Tūwharetoa (Taupo) and the Raukawa (Tokoroa) Trust Boards all concentrate on raising the standards of foundation skills of their local community populations, in response to a historically low level of Secondary School achievement.

**Table 2: Employment Statistics by Labour Force Status<sup>8</sup> 2006**

Territorial Authority Code (2006 Areas)	Territorial Authority Description	2006 Census, Work and Labour Force Status, for the Census Usually Resident Population Count Aged 15 Years and Over					Total
		Employed Full-time	Employed Part-time	Unemployed	Not in the Labour Force	Work and Labour Force Status Unidentifiable	
	District						
021	Taupo	12330	3831	687	7188	1182	<b>25218</b>
024	Rotorua	23886	6939	2172	14190	2055	<b>49239</b>
25-27	Total Eastern Bay	15153	5058	1992	12513	1563	<b>36279</b>
019	South Waikato	7206	2202	807	5532	858	<b>16605</b>
	<b>Totals</b>	<b>58575</b>	<b>18030</b>	<b>5658</b>	<b>39423</b>	<b>5658</b>	<b>127341</b>
<b>Bay of Plenty Total Region</b>				<b>Waikato Total Region</b>			
Working age population <sup>9</sup>		166600				194000	
Working labour force		111300				187600	
Unemployed labour force		10900				6400	

Employment in Tokoroa area has been affected by a reduction in forestry areas. It has recovered to some extent, with increased engineering activity, to the point where significant skills gaps are being reported, especially for operators and middle management.

## 2.6 Main Economic Sectors

A key factor for growth in the economy is labour productivity which currently sits well below the OECD average.<sup>10</sup>

Employment growth across New Zealand has been linked to an average growth in GDP of 3.6% per annum over the past five years. Labour intensive sectors such as construction, health, education, SME sector hospitality, tourism, personal services and education have seen skills gaps emerge.

Percentage employment for Māori has increased at an average 3.1% per annum since June 2000. In spite of a recent slowing of economic growth, a growth of 2.8% was reported in the year to June 2006.<sup>11</sup> This expansion in employment is higher than the economy-wide average of 2.7% (since 2000) and 2.6% (year to June 2006). Regional growth in Māori employment exceeded that of non-Māori.

<sup>8</sup> Department of Statistics, Census night data, 2006

<sup>9</sup> As at December 2006, DoL Quarterly Regional Reports, HLFS, Statistics New Zealand

<sup>10</sup> Statistics New Zealand. *Household Labour Force Survey – March 2006 Quarter*. Department of Labour. *Labour Market Outlook – April 2006*.

<sup>11</sup> NZ Department of Labour, Labour Market Reports – October 2006

## Regional Statement - The Wairariki Region 2008 – 2010

The 2006 Census recorded occupations in two ways, firstly by professional occupational type and secondly by industry. The tables overleaf are drawn from Statistics New Zealand census report made available to the writing team<sup>12</sup>.

Region wide, professional white and blue collar workers accounted for 43.2% of the workforce, manufacturing, trade and primary industry accounted for 42.3% while services and sales accounted for 14.5% of total employment in the region. Differences between sub-regions were supported by verbal evidence supplied at Regional Stakeholder meetings held in April-May 2007.

In numeric and percentage terms the sub-regional picture is shown in Tables 3, 4 and 5 which have been prepared from 2006 Census data.

The employment pattern of the region reflects its major industries of Forestry, Farming and Tourism, with Health, Community, Law and Educational Service Sectors supporting these income generating industries. Service sectors including, but not limited to, infrastructure support, building and construction logistics, added value processing, engineering, metal and wood manufacturing, general retail, automotive maintenance and marketing, banking and financial services complete the regional picture.

Emerging industries include those related to the unique Spa and Thermal based activities, including energy, horticulture and tourism ventures.

**Table 3: Occupation at Census 2006 for resident population, by sub-region<sup>13</sup>**

Territorial Authority Code	Territorial Authority Description	2006 Census, Occupation (NZSCO Major Group), for the Census Usually Resident Population Count Aged 15 Years and Over and Employed				
		Legislators, Administrators and Managers	Professionals	Technicians and Associate Professionals	Clerks	Service and Sales Workers
021	Taupo District	2394	1617	1497	1365	2748
024	Rotorua District	4311	4101	3300	3039	4689
25-27	<b>Total Eastern Bay</b>	2220	2460	1788	1818	2499
019	South Waikato District	900	852	690	765	1134
	<b>Totals</b>	9825	9030	7275	6987	11070
	<b>Percent of total</b>	<b>12.8%</b>	<b>11.8%</b>	<b>9.5%</b>	<b>9.1%</b>	<b>14.5%</b>
		Agriculture and Fishery Workers	Trades Workers	Plant and Machine Operators and Assemblers	Elementary Occupations incl Residuals	Total
021	Taupo District	1512	1551	1488	1992	16161
024	Rotorua District	2190	2712	2538	3939	30822
25-27	<b>Total Eastern Bay</b>	2682	1758	1950	3036	20205
019	South Waikato District	1566	777	1317	1404	9408
	<b>Totals</b>	7950	6798	7293	10371	76596
	<b>Percent of total</b>	<b>10.4%</b>	<b>8.9%</b>	<b>9.5%</b>	<b>13.5%</b>	<b>100.0%</b>

The differences between percentages in Table 4, show trends between sectors.

<sup>12</sup> Statistics New Zealand, Statistics report from 2006 Census – master tables by NZSCO Group

<sup>13</sup> Statistics New Zealand, Statistics report from 2006 Census – master tables by NZSCO Group

**Table 4: Occupational Type at Census 2006 for resident population by sub-Region <sup>14</sup>**

Area Code		Legislators, Administrators and Managers	Professionals	Technicians and Associate Professionals	Clerks	Service and Sales Workers
	<b>Sub-regional District</b>	<b>% of total employed workforce by category or work</b>				
<b>021</b>	<b>Taupo District</b>	14.8%	10.0%	9.3%	8.4%	17.0%
<b>024</b>	<b>Rotorua District</b>	14.0%	13.3%	10.7%	9.9%	15.2%
<b>25-27</b>	<b>Total Eastern Bay District</b>	11.0%	12.2%	8.8%	9.0%	12.4%
<b>019</b>	<b>South Waikato District</b>	9.6%	9.1%	7.3%	8.1%	12.1%
	<b>Totals</b>	12.8%	11.8%	9.5%	9.1%	14.5%

		Forestry, Agric, Hortic & Fisheries Workers	Trades Workers	Plant and Machine Operators and Assemblers	Elementary Occupations (incl Residuals)	Total
<b>021</b>	<b>Taupo District</b>	9.4%	9.6%	9.2%	12.3%	100.0%
<b>024</b>	<b>Rotorua District</b>	7.1%	8.8%	8.2%	12.8%	100.0%
<b>25-27</b>	<b>Total Eastern Bay</b>	13.3%	8.7%	9.7%	15.0%	100.0%
<b>019</b>	<b>South Waikato District</b>	16.6%	8.3%	14.0%	14.9%	100.0%
	<b>Totals</b>	10.4%	8.9%	9.5%	13.5%	100.0%

**Table 5: Normally Resident Population for the workplace Address – 2006 Data <sup>15</sup>**

Employment Type	Forestry, Agric, Hortic & Fisheries	Elec and Water Services	Manuf Trades & Construction	Retail and Wholesale	Tourism and Hosp
Number in workforce	7,086	498	12,030	9,273	9,666
% of total	11.1%	0.8%	18.9%	14.5%	15.2%

Employment Type	Media and Communications	Logistics & Transport	Professional & Business	Govt, Health and Educ & Support	Total
Number in workforce	591	1,989	7,728	14,886	63,747
% of total	0.9%	3.1%	12.1%	23.4%	100.0%

Historic differences in occupation often relate to town specialisations. Examples are provided by Forestry in Tokoroa or Kawerau, and in recent times by Tourism in Taupo or Rotorua. An example of the complexity of the regional economy is shown by a report on housing needs for Taupo township.<sup>16</sup>

“Until the early 1950’s Taupo town was a sleepy fishing hamlet that in a short period of time became a thriving township. This growth was initially driven by tourism, still a major economic driver, joined by forestry, farming, geothermal power production and retail in the more recent past. ...

According to the Employee Count Business Demography<sup>17</sup> data as at February 2006, 18.1% of employees are in the accommodation, café and restaurant industry; 17.1% are employed in retail trade; 8.8% are employed in the manufacturing industry; 7.6% are in property and business services; 7.6% are employed in the construction

<sup>14</sup> Derived from Statistics New Zealand, Statistics report from 2006 Census – master tables by NZSCO Group

<sup>15</sup> Derived from Statistics New Zealand, 2006 Census, Industry (ANZSIC06 Division), for the Workplace Address, for the Census Usually Resident Population Count Aged 15 Years and Over and Employed with statistics grouped by major type

<sup>16</sup> Taupo Township Housing Market Assessment-Summary for the Strategy, 12<sup>th</sup> February 2007, Taupo District Council.

<sup>17</sup> Statistics New Zealand

industry and 6.7% are in health and community services. Taupo has little to offer in high-end skilled employment opportunities, so there is little encouragement for young people to return upon completion of tertiary education. This has contributed to a lower percentage of high paying jobs in the Taupo District in comparison to National figures”.

Such local characteristics impact upon demand for tertiary provision and the social infrastructure which forms the local background to supply.

At a sub-regional level, comparisons can be drawn which illustrate the divergence of need and distinctive contributions required in different areas. For example, detailed regional economic development plans have been produced by Economic Development Units of the four main sub-regions, as well as some focused on individual communities. Figures taken from the Eastern Bay are shown in Table 6.<sup>18</sup>

**Table 6: Eastern Bay of Plenty Employment 2006**

Industry Sector	Employment (FTEs)	% of employed	Industry Sector	Employment (FTEs)	% of employed
Government, Health, Education and Community Services	4,267	27.1%	Construction	875	5.6%
Forestry and Wood Products	2,703	17.2%	Other Manufacturing incl Foods	583	3.7%
Dairy	1,693	10.7%	Retail/ Wholesale	2,521	16.0%
Other Agriculture and Primary Industry	869	5.5%	Transport & Storage	410	2.6%
Accommodation, Restaurants & Cafes	521	3.3%	Energy, Utilities & Communications	119	0.8%
Professional, Personal and Business Services	1,093	6.9%	Media	99	0.6%

As a direct comparison, South Waikato reported at February 2005, that Manufacturing employed 31.4% of all employees, Retail employed 13.4%, and Agriculture and Forestry 10.7% between them. Agriculture (dairying) and Forestry until recently had been the largest employers. Changing production methods have meant that the primary sectors now use more advanced technologies in production, while also supporting increasingly technologically advanced processing industries. This has resulted in changes to employment characteristics.

In 2005-6, conversion from Forestry to Dairy Farming and to beef and sheep with some lifestyle application, has gained in speed across the entire region. In South Waikato and Environment Bay of Plenty areas, some 65,000ha of Kaingaroa Forest and other smaller forests are earmarked for conversion by 2020. In South Waikato and Taupo districts alone this is predicted to generate some additional 420 jobs in farming itself. There is reported potential for new dairy processing and considerable knock on effects to local industry and infrastructure.

There are major differences between the Eastern Bay and South Waikato, in particular in areas of Manufacturing, Construction, Forestry, Dairying and in Government Services.

<sup>18</sup> Toi-EDA Eastern Bay Regional Economic Development Strategy 2006:EBOP-REDS, October 2006

Regional meetings reported a major deficit in trades and manufacturing labour in the South Waikato region. If skilled labour is available there was reported to be considerable potential to grow the number of businesses as well as size of each business. This view of skills gaps limiting economic growth is common across all four sub-regions, with local differences affected by the overarching geophysical and cultural characteristics. Eastern Bay was more concerned with maritime and aquaculture, along with future of the inland areas, especially the Kawerau area, with horticulture, dairy and related food processing also featuring.

Statistics for Taupo and Rotorua regions show that similar differences exist between these regions also. Numerically Rotorua and Central Bay of Plenty support the largest population and generate the largest Tourism and Service Sector economies. The distribution of Forestry and Wood Processing sites and of related high technology processing plants has evolved to meet the needs of the primary sector, adapting to world demand as well as local specialisms. Recent growth in engineering and other manufacturing and service sector support activities, including logistics and food distribution, has been determined by historical population growth, raw material supplies and the almost complete absence of rail as a means of transport.

### **3. Regional Needs and Gaps**

Regional stakeholder and provider meetings identified local views on key employment skills gaps, where action is needed to address issues of skills and lack of labour availability. Significant employment sectors were confirmed, corresponding with the statistics shown in section 2.

Emerging employment trends were also identified. These give advance warning of future needs which the tertiary sector must meet.

#### **3.1 Educational Achievement**

Both social and Māori focused studies have indicated a substantial underachievement in secondary education of large sectors of the population until very recent times. This particularly applies to the Māori and Pacific population.

The 2006 Te Arawa study<sup>19</sup> reported that in 2001 across the rohe over 40% of Te Arawa rangatahi were leaving secondary school without qualification. This was slightly above the national Māori rate. Only 5.2% were at that time participating in Tertiary study with Te Arawa iwi itself measured at 7.2%.

A Ngāti Tūwharetoa report made available to the writing group showed a national participation rate in levels 1 to 3 tertiary study at 5.58% of all Māori in 2002 rising to 7.0% in 2005. Of these 32.9% were under the age of 25, with 26.1% from 25 to 34 years of age. From age 35 to 44, 22.2% were following tertiary study at these foundation levels while a further 18.7% were over the age of 44 years<sup>20</sup>. Many of these students will have been studying language, literacy, numeracy and basic computing programmes, showing the considerable demand for such activity in the region.

Completion rates for Māori nationally, in 2005 year were reported at 24.1% for levels 1 to 3 rising to 31.6% for Level 4 Certificates. Completion of Diplomas and Degrees takes several years, particularly where study is part time, hence without sophisticated tracking of individual study this cannot be calculated readily. Nevertheless, participation studies show that in 2002 11.5% of Māori students were studying at Bachelor degree level, with 9.7% in 2005. The drop reflects a small increase in enrolment in degrees but a much larger increase in

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<sup>19</sup> Tukua Mai Kia Piri Te Arawa E, Te Puni Kokiri, 2006

<sup>20</sup> Profile for all students of Maori Descent; Hei Ara Kokiri, April 2007

level 1 to 4 certificate enrolments, from 76.9% to 81%, an increase of 4,760 in actual enrolments.

The region does not have a University Campus within it. Students studying at degree level and above must either enrol in on-line distance or tutor supported blended provision, or move out of region. The main ITP, Waiariki, and the Wananga in Whakatane both offer specialised applied degrees, with Waiariki offering a Nursing Degree from which students have successfully achieved top marks in NZ National Nursing Qualifications over recent years. The Universities of Canterbury and Waikato, Auckland University, AUT, and WINTEC all operate within the region by distance and with tutor supported programmes.

Waiariki has recently established pathways to Canterbury University with in-region provision of the first year of degree study, stair-casing to Christchurch based study in year two and three. The Institute also maintains close relations with University of Auckland, University of Waikato and offers a WINTEC Bachelor of Social Sciences at its own and collaborative bases in Tauranga and Tairāwhiti, in an attempt to support a cohesive and comprehensive Network of Provision, serving local needs.

Applied research in the region is constricted by the lack of a University campus. SCION, the National Centre for Forestry and Wood Processing, in Rotorua, is a significant local employer. SCION leads research into new Intellectual Property development for its sector, working closely with the advanced technology sustainable forestry and wood technology industries. New emerging areas can lead to greater employment growth and will require support from new tertiary training applications.

The thermal sector has a growing interest in commercial development, largely led by iwi trusts with some tertiary contact developing, along with business incubation services from the main regional towns and their Chambers of Commerce and other business support organisations. Taupo leads bio-fuel development in sustainable forest cropping.

### **3.2 Skills Gaps**

Occupational shortages in New Zealand are well documented by the Department of Labour and will not be repeated here<sup>21</sup>. A considerable quantity of research has been undertaken and reported in recent years relating to these. Much of this concentrated on capturing vacancies in jobs offered, while APR Consulting led a number of detailed surveys across the region<sup>22</sup>. Economic Development Agency reports also draw on these datasets in planning and projecting regional labour force needs.

The main lesson to be drawn from skills gaps analysis is that there is a persistent and ongoing challenge to economic and community growth. This has arisen because under achievement in secondary and tertiary education has combined with an outflow of skilled labour. At the same time global industry practices have changed as new technologies have become available to operational and management staff and new global trade opportunity, including that of the “weightless economy”<sup>23</sup> of the internet has arisen. All of these issues must be addressed in any tertiary strategy.

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<sup>21</sup> Occupations in Shortage in New Zealand; Department of labour, March 2007: Quarterly Regional Labour Market Updates, December 2006: March 2007.

<sup>22</sup> Skills Gaps Surveys in the Waiariki Region, various reports 2002 to 2005, APR Consulting, Rotorua.

<sup>23</sup> Yet So Close: Connecting New Zealand to the Global Economy, Discussion Paper 2007/1 The New Zealand Institute, Auckland.

### **3.3 Stakeholder and Provider Views**

Eight major economic employment sectors were reported. Across the entire region; others are specific to one or more sub-regions. To emphasise the diversity within the region, the sectors are presented by sub-region, below. While this summary drills down beyond the intended “high level” set out in the TEC regional plan briefing, regional facilitation itself demanded that an element of such drilling was necessary, to highlight the distinctive nature of the region’s potential.

In addition to the economic sectors, a strong need was consistently expressed at regional meetings and by subsequent correspondence responding to the published discussion draft, that generic life, learning and work ethic skills also require to be substantially reinforced. A common view was presented that a strong economy demands strong employment and equal career opportunity across all ethnic groups. Foundation skills are required to underpin effective lifelong learning and give such opportunity. The outcome will be greater community and economic development across the entire Wairiki rohe.

Opportunity to benefit from tertiary learning is required for as wide a cross section of the population as possible. The educational demand was for not simply trade or industry skills, management or social capability, but for a holistic work ethic and life-skills approach. This was demanded to enable learners to cope with two or more major career shifts in a working lifetime and to offer potential which will enable the aging sector of the population to continue contributing to the regional economy, albeit on the basis of personal choice, after retirement.

#### **3.3.1 Government As A Stakeholder – Alignment with STEP and TES**

The Tertiary Sector is charged by Government to:

1. Increase the number of New Zealanders achieving qualifications at higher levels e.g trades training, diploma, degree and postgraduate education;
2. Ensure more young New Zealanders complete their tertiary education qualifications before the age of 25;
3. Improve literacy, numeracy and language skills of New Zealanders;
4. Reduce skills shortages through improving the relevance of tertiary education to the needs of the labour market;
5. Continue to build excellence of tertiary research;
6. Increase the application of tertiary research to economic, social and cultural development<sup>24</sup>.

Regional Facilitation Workshops determined that these priorities fit almost exactly with regional needs. Points 1 to 4 reflect those identified and recorded above, with the exception of an emphasis which was placed across the region on the need for lifelong learning rather than a shut off at age 25 indicated in STEP, at least until the lost generation of learners are upskilled and able to participate fully in economic and community growth. They also enable the region to offer its solutions to improved tertiary performance in an integrated and collaborative Network of Provision, built upon its distinctive character and upon contributions from those best suited to collaborate in the new tertiary model, following TEC and government stated objectives.

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<sup>24</sup> Tertiary Education Strategy 2007-2012 incorporating Statement of Educational priorities 2008-2010, page 6, TEC.

Points 5 and 6 have been identified during regional facilitation as in need of additional input. Without a University Campus in the region, the intended knowledge based society, signalled by government, requires greater emphasis on applied research, new IP development and its commercialisation. Shift from Forestry to Dairy, increased significance of culturally sensitive and ecologically sustainable husbandries including tourism, plus new materials and funds levied from the primary sector, will require revamped research efforts to lift the regional economy. Collaborative partnerships will be required to increase regional equality above the Forest industry focus of SCION. Limited collaboration already exists between Wairariki, the Wananga, and Universities technical degrees.

Underpinning research with international partnerships and links to Crown Research Centres, such as SCION, Ag-Research and Hort-Research and their associated Innovation Parks. These must focus on cultural, sociological, technology and business areas and application of new IP to social, economic growth and business.

Research application may be within companies, Māori corporate trusts and include offshore partnerships. Inter-regional and cross sectoral relationships will further strengthen under the new collaborative tertiary model to assist the innovative and knowledge based society demanded by Government.

### **3.3.2 Tertiary Learners**

One in five adults in New Zealand are at the lowest level of literacy and 30% need to improve functional literacy skills. Only 30% of Māori and Pacifica have adequate levels of functional literacy, compared with 60% for traditional NZ European.<sup>25</sup> These trends are repeated across the Wairariki region.

By 2010 the population numbers in the school-age bracket are expected to decrease as lower birth rate statistics work through the year groups. However, there is still a very significant demand for foundation learning in the working population, particularly expressed by those who support the motivation and bridging into work of the “lost generation”.

The graphic inside the front cover demonstrates these various layers and interconnectivity between and within the tertiary stakeholder groups.

By 2016, a reduction of 3,800 primary and 2,100 secondary students is projected across the Wairariki region. This will result in a lower number of people leaving school and moving into tertiary education, adding to the shift towards a more mature tertiary student population. However, this is not seen as an opportunity to reduce tertiary funding, as it would have been in a “bums on seats” model of financing. More as an opportunity to direct resources into key sectors where technological skills can be introduced to increase per capita output and, therefore, employment related income.

Adult learners will have dependent children and many will be in, or wishing to be in, employment. The TES and STEP publish a wish to see greater numbers of school leavers entering the tertiary sector and completing their study by twenty five years of age. However, regional statistics indicate that while this must be a long term goal; in the rural and often disadvantaged environment of the Wairariki rohe, first progress must be made to capture workforce potential through a programme of up-skilling the existing workforce, many of whom are over 25 years of age and many in mid-life.

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<sup>25</sup> TES and STEP – Network of Provision in a Collaborative Tertiary Sector

Notwithstanding the poor performance in recruitment of school leavers to direct study from secondary school in recent years, these trends will result in increased numbers of part-time adult students. The expected effect will be a greater demand for flexible/blended and distance delivery of tertiary education programmes for community based, home or workplace learning.

The ethnic composition of students enrolled in the Tertiary Sector in the Waiariki region is very different from the national average for the polytechnic sector. All ethnicities are under-represented, compared with the sector average, except for those of Māori origin. This group formed the majority, in a study carried out at Waiariki Institute itself. When the effects of Wananga are added, the Māori population make up a higher proportion and a more cohesive group among tertiary students than all others.

### **3.3.3 Iwi and Māori Trusts**

The Waiariki catchment area encompasses eleven tribal groupings, each with distinctive boundaries. These boundaries do not fit neatly into the regional map. Each Iwi has its own focus within its own local and wider needs.

The tribal authorities include Whānau Apānui, Ngai Tai, Whakatohea, Tuhoe, Ngāti Awa, Te Arawa, Ngāti Manawa, Tūwharetoa, Ngāti Raukawa, Ngāti Maniapoto and Ngāti Haua. Within these tribal authorities there are at least 40 runanga and over 200 marae, each with their own management structure and many with educational interests either alone or in partnership with Wananga and Runanga. Aligned to these are a number of Māori trusts and incorporations which have a strong commercial focus, with Māori business protocols and an estimated value base of over NZ\$1.5 billion.

Te Arawa Lakes Trust in Rotorua, Tūwharetoa allied with Mighty River Power in Taupo, Raukawa Trust in Tokoroa and trusts in Opotiki and Whakatane all offer considerable influence and potential inward investment to benefit their iwi and consequently the region's peoples and the economy.

At present, claims represent over \$100 million in settlements for the region. The Waiariki Māori economy is expected to grow significantly in the next 10-20 years as a direct result of Māori corporate activity (>\$7 billion+ p.a.). This will have significant impact on the region's employment prospects, inward investment, social fabric and expectations of the tertiary sector.

There will be a need for skills and knowledge to manage assets and economic growth, in order to maximise opportunity for Māori communities.<sup>26</sup> Much of this will be driven by the iwi trusts themselves. This will require flexibility from major providers, a common purpose and sensitivity of the emerging educational model to the bicultural framework required and a workforce empowered to operate in the multiracial and global labour market economy. The challenge for any tertiary network of provision, is not just to increase Māori capacity along the lines of social equity, but to grow mutual confidence and trust between sectors of the community, to give the ability for a non-Māori workforce to engage confidently with Māori employers and Māori focused industries and vice versa.

The Māori element has significant importance in how future tertiary courses will be developed and delivered in the region. In particular the current lack of foundation capability, work ethic and life skills has created a very limited vision of opportunity in some sectors of

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<sup>26</sup> Office of Treaty Settlements. *Progress of Claims*.

the population. Employment in corporate owned business, such as traditional forestry and low income primary land assets will decline in comparison to added value and technology based activity within this growing Māori sector. Emerging technologies, such as advanced satellite telecommunications, thermal energy, bio-fuels and forest product based biotechnologies, will become significant enterprises to be supported by the unique collaborative network of tertiary provision in the Waiariki region.

One factor in the argument is the proportion of iwi who live and potentially work within the region compared to those who live outside: Population demographics for Ngāti Tūwharetoa show approximately 14% of the iwi reside in the rohe surrounding Lake Taupo with 86% living out of the area. The inward focus of Māori trusts in recent years has established a strong evidence base from which the leaders of the trusts are developing their social support programmes, supported by business income potential. For example, Tūwharetoa reported that there has been a 3.5% decline in the student population for non-Māori between 2001 and 2006 and a 4% increase (60) of Māori students from 2001-2006.

Greater traction in the community will encourage a new vision among the disparate and “lost” community members, who currently merely exist in the region, albeit in many cases a minority of the iwi members themselves. Another factor is that those who have left to live elsewhere in New Zealand, or overseas, retain their tribal and home area affiliations. They will increasingly be able to influence regional development outcomes through greater communication via world wide web based media, such as the recently launched Te Arawa “[naumaispace.com](http://naumaispace.com)” web site and the greater understanding which the tertiary sector can offer both for Te Reo and for Māori Cultural awareness and traditions.

### **3.3.4 Industry Training Organisations (ITOs)**

Industry Training Organisations are a major player in the new Tertiary Model. They have a national role of identifying major industry and workplace training needs, managing apprenticeships and ensuring quality outcomes. There was little input from ITOs into the regional facilitation process. However all national ITO offices and local contacts were circulated with the draft consultation document. Several responded, to the opportunity with comment including FITEC, HSI, ATTTO, ETITO, CSSITO, in addition comments from DHBNZ have been received.

ITO feedback led to some amendment of the content of section 2 above, in particular the strengthening of the foundation and work ethic needs sections and the need for lifelong learning and professional up-skilling. This included developing better workplace learning strategies and techniques, as a significant contribution through a collaborative network of tertiary provision.

In an attempt to determine the significance of ITOs to the Waiariki region the TEC ITO report for 2006 was consulted.<sup>27</sup>

Records from the Modern Apprenticeship Scheme add weight to the significance of the ITOs across the region. The 2006 report published data which is reproduced in Table 9.

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<sup>27</sup> Industry Training and Modern Apprenticeship Statistics as at September 30<sup>th</sup> 2006, Tertiary Education Commission, Wellington

**Table 9: Modern Apprenticeships in the Wairiki Region 2006<sup>28</sup>**

<b>Modern Apprenticeships within the Wairiki Region, 2006</b>	
Primary Industry	59
Hospitality & Tourism	70
Gov Health & Family Support	4
Retail & Wholesale	7
Manufacturing & Added Value Trades	470
Professional & Business Support	0
Sport & Recreation	0
Electricity & Services	22
Maritime & Aquaculture	6
Extractives & Mining	0
<b>Total Number</b>	<b>638</b>

This number represent 1% of the workforce population recorded in Table 5: 638 Modern Apprentices among a normally resident workforce recorded at 63,700.

**Table 10: ITO Trainees in the Wairiki Region and in the Waikato-BoP Total area**

<b>Main Sector</b>	<b>Estimated Number * of Trainees under ITO Supervision in Wairiki Region</b>	<b>Total Trainees in Waikato and Bay of Plenty</b>
Primary Industry	2,347	6,065
Hospitality and Tourism	693	1,791
Gov Health & Family Support	1,050	2,712
Retail and Wholesale	897	2,318
Manufacturing & Added Value Trades	3,161	8,169
Professional and Business Support	-	481
Sport and Recreation	186	786
Electricity and Services	304	786
Maritime and Aquaculture	120	309
Extractives & Mining	368	950
<b>Totals</b>	<b>9,126</b>	<b>24,367</b>

\*Allowing for the urban population of Tauranga/Western Bay and Hamilton-Waikato, the approximate number of ITO trainees has been calculated from the percentage of population in the respective areas.

### **3.3.5 Business and Employers**

During the process of consultation the draft document prepared was circulated to over 40 regional businesses of significant size, in addition to local Chambers of Commerce, SWAP and other business organisations. Limited feed back was gained from these bodies, with the exception of a national Agriculture Training Provider which is part of a national merchant chain. The views below are distilled from regional meetings and this feedback.

In addition to the Māori Trusts, the Wairiki rohe has substantial assets owned by both local, New Zealand wide and internationally based corporate and private organisations. Many of

<sup>28</sup> Industry Training and Modern Apprenticeship Statistics as at September 30<sup>th</sup> 2006, Tertiary Education Commission, Wellington

these are not resident in the region, and therefore may be driven by non-Māori and non-New Zealand based profit motives. Examples are provided in the forestry sector with USA pension fund interests, in the hospitality sector with Thai and European interests and with multinational ownership of potential and existing tourism resources. This compares with the co-operative roots of some of the now multinational corporates which undertake greater volumes of business outside New Zealand than inside. These trends determine that those who graduate from Tertiary sector provision must be enabled to operate in a global, not just a New Zealand environment.

The international movement of capital, the maintenance of a low wage environment and a priority to invest in short term gain, all mitigate against improved local wealth and improved social conditions. Traditional economic models may not, however operate in a sustainable way in the modern global economy, neither will they work in the modern emerging Māori economy. The tertiary sector must cope with such effects.

Investment by local and international business into up-skilling their own workforce is observed in large corporate employers, such as Fonterra, the large Forestry companies, Comvita and the kiwi-fruit sector, LandCorp, Regional and District Councils, the Health Sector and large Educational and Research employers. Many of these direct investments into the employed workforce also involve relevant ITOs, regional and national tertiary providers.

Collaborative partnerships must be further facilitated to gain a region wide culture of up-skilling the workforce, as part of lifelong learning. The mobility and seasonality of the workforce needs to be captured, acknowledged and addressed in the new tertiary model. Cross regional agreements can assist by enabling mobile workers to continue their education as they and their families follow work.

### **3.3.6 Tertiary Providers**

Attendance at provider workshops held across the region was strong from the Private Training Sector, the three Wananga and from Iwi Educational Trusts. (See appendix 2 list of attendees). In addition several of those in attendance, and the writing group itself, had interests in and represented larger provider groupings.

Further feedback was gained from The Open Polytechnic, from Telford Polytechnic and from Private Agricultural Training Business operating on a national basis.

The evidence provided is included in Section 2. Additional points which must be considered are the need to develop a network of tertiary provision which meets the specialised needs of current and future employers and of the learners themselves. This is required to meet the needs of not only urban environments, but the rural population which suffer from access challenges. Sectors such as agriculture, anticipate continued growth in their employee base in line with rising production and output, while forestry is advancing due to adding value and increased use of technology. This growth can underpin added value industries and a wide range of other service sectors in a balanced economy.

The region is fortunate in having all three of the major economic sectors of Forestry, Farming and Tourism. Increasing local production of added value products, greater infrastructure and manufacturing capability, all facilitate multi sector growth through cross and inter-regional, as well as international trade. However a gap exists which the tertiary sector could fill in a new model of provision. Outreach through vocational learning support into regional communities is a well proven method of regional economic development. In areas where the role of state funded research centres has changed or where state financed advisory and extension services have ceased, the tertiary sector could help fill such gaps in future.

Access to learning, through modern distance mode, using digital telecommunications requires investment in technology and learning infrastructures before product is delivered. This compares to the former model of face to face training, where investment was required in people as trainers or extension officers, with limited infrastructure investment often being used thereafter. This change effects both private and public sector tertiary providers, as well as local and national providers, and is highly relevant to future delivery of stakeholder needs across the Wairariki region.

Feedback from the Tertiary Teaching Union indicated a strong will at national level to have greater input into the Regional Facilitation process in future years. Local feedback supported the overall balance of the Regional Statement, with the inclusion of life-values, and the wider vision of culture, music, arts and religious understanding, as an essential part of a cohesive, vibrant, multicultural urban and rural society in the region.

### **3.4 The Need for Tertiary Products**

Continual updating of industries is essential to grow achievement and economic output if OECD rankings are to improve to meet greater personal income goals. Without lifelong tertiary provision, industry and employment practices were signalled as falling out of date, once formal education is completed.

The region has 5% of New Zealand's population. However, the potential economic output is considerably greater, with tourism and primary industries able to benefit from the unique thermal assets, the Māori economy, the growing international communications infrastructure and the closeness to growing internal markets in the wider Auckland and Tauranga zones. Two thirds of economic growth within New Zealand in the last fifteen years is reported to have been from an increase in the number of hours worked<sup>29</sup> as labour participation rates have increased and unemployment has fallen. Only one third is reported to have been due to labour productivity gains. Increased uptake of technology, encouraged by modern well resourced tertiary vocational training and education can have a major impact on labour productivity.

There is a major role for the Tertiary Sector to play, in increasing technology uptake, changing work habits and management capability. Regional facilitation confirmed this to be the view of the region's stakeholders and providers.

The internationally accepted model of full time learning, until the early twenties age group was not considered appropriate at this stage in regional development. Even more so as a large proportion, estimated at up to 30,000 persons, have left secondary education and missed tertiary inputs in the last fifteen years. These offer enormous challenge to the tertiary sector in recapturing potential learners from a "lost generation" of the mature population. Challenges exist, both in terms of learner access to tertiary provision and in terms of motivation to learn. The need to up-skill individuals has to be fulfilled from the perspective of provision through an effective collaborative tertiary network.

### **3.5 Regional and Sub-Regional Needs**

The following areas were highlighted as demanding continual lifelong tertiary access to relevant and high quality provision. The sector must offer content and learning skills which are constantly updated to be in tune with internationally available systems and technologies both in learning processes themselves and in the content delivered in an outcomes focused approach.

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<sup>29</sup> No Country is an Island: The New Zealand Institute, Discussion Paper 2005/3, November 2005

All sub-regions demanded that generic skills and common needs be met by Tertiary provision. These common needs included:

- 1 Lifelong Learning Stair-casing and Links
- 2 Literacy, Numeracy and Language
- 3 Foundation Work Ethic Skills
- 4 People and relationship skills
- 5 Tolerance of multicultural viewpoints supported by Arts, Music, Media and Religious understanding

The outcomes from the four sub-regional series of meetings are summarised below in bullet point format.

### **3.5.1 South Waikato (Tokoroa, Mokai, Putaruru, Tirau)**

#### **Key Economic Employment Sectors**

- Agriculture
- Forestry and Wood Processing
- Manufacturing, Wood & Metal Engineering
- Trades and Construction
- Business Management & Services

#### **Trends which require input in order to address skills gaps and/or future labour force needs**

- Tourism
- Water usage, including aquaculture, thermal spa industry & bottling
- Renewable energy
- Transit hub and logistics
- Health & Community Support Related Services

### **3.5.2 Eastern Bay of Plenty (Whakatane, Kawerau, Opotiki)**

#### **Key Economic Employment Sectors**

- Agriculture and Horticulture
- Tourism
- Engineering & Trades
- Public Sector Services
- Business Management & Services

#### **Trends which require input in order to address skills gaps and/or future labour force needs**

- Māori Development – Land Utilisation, Resource and Business Management
- Coastal and Maritime Aquaculture
- Foreshore and Maritime Conservation and Ecology
- Retirement and Health Services especially in Coastal Zone
- Logistics and Infrastructure support

### **3.5.3 Taupo Region (Mangakino, Turangi, Taupo, Wairakei)**

#### **Key Economic Employment Sectors**

- Tourism & Hospitality, Events Management
- Retailing (Customer Service)
- Forestry
- Agriculture and Horticulture
- Trades – Building & Construction
- Business Management & Services

#### **Trends which require input in order to address skills gaps and/or future labour force needs**

- Geothermal Energy, Spa & Horticulture
- Biofuels
- Logistics & Infrastructure
- River & Thermal based aquaculture
- Retail and customer service skills

### **3.5.4 Rotorua (Central Bay of Plenty, Lakes Region, Edgecumbe, Te Puke, Mamaku Plain)**

#### **Key Economic Employment Sectors**

- Tourism & Hospitality
- Agriculture & Horticulture
- Forestry & Wood Processing
- Health, Spa, Beauty, Culture
- Education and Training
- Building and Construction
- Research
- Public Services, Law and Community Care
- Business Management & Services

#### **Trends which require input in order to address skills gaps and/or future labour force needs**

- Biotechnology – bio-fuels and wood base novel materials
- Engineering
- Commercialisation skills from new research output and IP development
- Business
- Health & Social Services
- Māori Resource Development – Land Utilisation
- Geothermal resources
- Infrastructure & Trades
- Applied Research on Māori Culture and Sustainable Ecological Land Use

## 4. Matrix of Regional Needs, Gaps, Trends and Priorities

### 4.1 Common Themes To Be Met By The Tertiary Sector

No	Needs	Gaps	Trends	Priorities
4.1.1	Lifelong learning capacity increased with clear stair-casing between age groups, learning levels and different communities	<ul style="list-style-type: none"> <li>Poor linkage from secondary to tertiary</li> <li>No in-region University campus</li> <li>Not favouring formal workforce up-skilling</li> <li>Reluctance to recognise offshore quals</li> </ul>	Skills gaps filled by up-skilling workforce from basic foundation levels with more opportunity for progression within and between regions and by inward migration	Generate increased collaboration across the sector both inside Wairariki boundaries and to other NZ tertiary operators in other regions, between tertiary providers and from secondary to tertiary
4.1.2	Literacy, Numeracy and Language foundation skills improved across the region (LNL)	<ul style="list-style-type: none"> <li>Disadvantaged poor quality secondary achievement</li> <li>Low school leavers under achievement leads to tertiary loss</li> <li>Many mature individuals with low LNL skills</li> </ul>	Wastage of human capital as more students under achieve, holding down economic growth and confirming cycle of low aspiration and achievement	Address foundation skills gaps through action in the communities affected with lifelong learning measures through ACE schemes using public and private sector operators equipped to offer high quality learning support
4.1.3	Foundation work ethic skills in need of improvement in many employment areas	<ul style="list-style-type: none"> <li>Lack of linkage between “into work” schemes and tertiary mentoring</li> <li>Employers report losing productive capacity due to poor work ethic</li> </ul>	Greater pressure on employers as businesses expand and economy grows, resulting in loss of market share	Identification of core cadetships, employment sectors and mentoring agencies, required to bridge work-skills gaps
4.1.4	People and relationship skills in need of improvement in many sectors	<ul style="list-style-type: none"> <li>Low people relationship skills impact on business potential</li> <li>Culturally appropriate approaches are poorly integrated into curricula and training methodologies</li> </ul>	Increased economic activity and tourism growth both demand excellent cultural understanding to ensure effective employment and customer experiences across all sectors	<p>Attention to customer and workplace relationship management across all training sectors</p> <p>Ensuring Māori knowledge base and values are included in curriculum from educational providers</p>
4.1.5	Improved tolerance of multicultural viewpoints supported by artistic/cultural facilities available to all who wish to use them	<ul style="list-style-type: none"> <li>Uneven distribution of holistic cultural and artistic facilities</li> <li>Limited support to varied arts and cultures through region wide networks</li> </ul>	Greater challenge to traditional beliefs with increased income raising expectations for culture, religion and arts	Region wide access to performing arts from many cultures, supported by effective training networks and personnel who are empowered to deal with global challenges

## 4.2 Distinctive Tertiary Contributions Demanded by Common Regional Sectors

No	Needs	Gaps	Trends	Priorities
<b>1. Forestry, Farming and other Primary Land Based Occupations</b>				
4.2.1	Forest and industry workforce required to update and keep abreast of technology and global trends Reduced land area resulting in falling manual employment prospects	<ul style="list-style-type: none"> <li>Continual upgrading of technological capability restricted by funding</li> <li>Challenges of global industry marketplace connectedness</li> <li>Training sector demands greater integration of workplace learning with formal sector</li> </ul>	Internationalisation of the industry will continue with greater technology inputs directed at forest maintenance and wood processing leading to increased output per person employed and ever increasing skill needs	Ways need to be found to combine effective theory and practical training of operators and managers in high technology use with sufficient resources and a fundamental knowledge of sustainable forest systems in the new global trading environment getting away from “chainsaw mentality”
4.2.2	More skilled and dedicated, ecologically and culturally sensitive farming practitioners and managers required	<ul style="list-style-type: none"> <li>Farming labour force is in short supply with limited skills</li> <li>Farm Management capability is limited by narrow vision of available technologies and techniques</li> <li>Dairy, pig and poultry sectors suffer from lack of labour continuity and staircased career pathways</li> </ul>	Increase in dairy farm and cow numbers with increased need for application of ecologically sustainable business practices by a growing, skilled workforce. Increasing awareness of animal welfare issues will raise concern on intensive compared with extensive systems	Train dairy sector operators, farm managers and owner occupiers in basic skills plus business and ecologically sustainable practices from basics to advanced practice. Industry wide need for animal welfare and ecological sustainability to be embedded in curricula.
4.2.3	Replace low cost casual, seasonal hand labour with increased mechanisation and skilled workforce	<ul style="list-style-type: none"> <li>Shortages of seasonal labour force limiting industry growth</li> <li>Seasonal workforce tends to be itinerant with poor access to learning</li> </ul>	Increasing local and international added value markets for horticultural, agric & advanced wood products reducing seasonality	Upskill existing workforce and encourage young persons to enter a long term career in the sector with greater technology awareness
<b>2. Tourism with Hospitality</b>				
4.2.4	Culturally sensitive highly skilled front line and operational staff in existing and new businesses	<ul style="list-style-type: none"> <li>Skilled labour shortage for high quality service provision to growing markets</li> <li>Low wage sector requiring greater income and less seasonality in order to sustain higher wages</li> </ul>	Growing labour shortages which restrict the ability of the sector to grow enterprise size and meet demand for high quality services and products.	Service staff training for front line, management and marketing training, including in-service and work based schemes In service management training for middle level managers to raise standards

Regional Statement - The Wairariki Region 2008 – 2010

No	Needs	Gaps	Trends	Priorities
<b>3. Social, Health, Family and Law Enforcement/Rehabilitation</b>				
4.2.5	Greater supply of skilled labour to satisfy demand in health, community services, palliative care and law sectors	<ul style="list-style-type: none"> <li>• Insufficient skilled professional health sector staff</li> <li>• Law enforcement/rehabilitation suffering from poor image and changes in culture</li> <li>• Insufficient supply of trained medical staff for efficient services</li> <li>• Overload on personnel encourages further loss of qualified staff</li> </ul>	Increasing age of NZ European population will combine with challenges in Māori and Pacifica lifestyles, resulting in greater needs for medical and other professionals who are cultural sensitive	<p>Greater number of Māori and Pacifica origin coming through to professional levels in the social support/health sector workforce</p> <p>Greater recruitment of overseas professional staff with recognition pathways for qualifications</p> <p>Greater resourcing of training sector for medical and associated workforce required in the urgent future to meet growing demands</p>
<b>4. Education and Training</b>				
4.2.6	More qualified staff to fill vacancies in professional vocational training sector	<ul style="list-style-type: none"> <li>• Technology enabled staff are not coming forward into the sector as industry returns are higher in key areas</li> <li>• NZ European staff are aging and retiring with limited potential replacements available from NZ sources</li> <li>• Culturally empowered trainers who can combine curriculum content with a world view acceptable to Māori and other ethnic groups</li> </ul>	<ul style="list-style-type: none"> <li>- Increasing use of technology demands technology natives as core trainers</li> <li>- Workforce retiring with low volume of NZ home grown replacements</li> <li>- Increasing % of Māori in trainees and workforce demands greater cultural curriculum content and knowledge.</li> </ul>	Recognition of international qualifications to enable rapid integration of migrants into the workforce combined with resourcing of training trainers across all sectors of economy including cultural empowerment to meet regional demands
<b>5. Trades Skills</b>				
4.2.7	Sufficient skilled trades persons to meet local demand	<ul style="list-style-type: none"> <li>• High profile building and engineering vacancies increasingly holding back local economy with vacancies in most job areas</li> </ul>	Greater technical capability required along with absolute numbers of skilled trades people	Invest in Trades training to offer careers for young people and for those who wish to make a career change in later life

## Regional Statement - The Wairariki Region 2008 – 2010

No	Needs	Gaps	Trends	Priorities
<b>6. Added value industries to increase regional benefit</b>				
4.2.8	Skilled engineers, service and construction professionals, operators, managers, and marketeers	<ul style="list-style-type: none"> <li>Added value industries not able to meet potential supplied by primary sector for growing home and international markets</li> <li>Labour force has insufficient skills to meet industry needs</li> <li>Unable to compete with imported goods due to insufficient capacity</li> </ul>	Greater scope of internationally available technologies for adding value to primary products is missed due to insufficient personnel resources and lack of SME sector growth	Training in advanced added value technologies for wood processing, food manufacture, equipment making, applied novel materials science application
4.2.9	Efficient logistics support with other communication and energy infrastructures to enable rapid and safe transfer of goods as trade volume increases	<ul style="list-style-type: none"> <li>Inability to ensure rapid movement of fresh goods due to lack of supply of automotive and infrastructure service engineers except where large corporations are already established</li> <li>Telecommunications links restrict rural access for efficient supply chains</li> </ul>	Growing volumes of product demanding increased regional logistical and communications capability with tracing technologies to supply local and global markets via Tauranga port, airfreight and road routes	Support to training of infrastructural maintenance skills, technology development and planning processes
<b>7. Best practice business and financial management services</b>				
4.2.10	Small Businesses need to grow in sustainable ways	<ul style="list-style-type: none"> <li>Low management skills reduce ability for business growth</li> <li>Business management skills in limited supply for SME and large sectors</li> </ul>	Growing challenge of taking one man owner-trading companies to multiple employees to meet demand for products and services	Investment required in business commercialisation skills and mentoring services for emerging and existing sectors
4.2.11	Managers need career pathways which keep them in NZ with appropriate rewards	<ul style="list-style-type: none"> <li>Quality managers for middle and upper level positions including self employed persons</li> <li>Restricted access in the region to senior management training</li> </ul>	Businesses suffer increasing challenges when highly skilled and experienced managers leave to EU, USA and Australian employment	Resources and pathways must be designed and allocated to generic business skills in a way that is suitable to be accessed by all sectors in the region, with appropriate rewards for operators and trainers

Regional Statement - The Wairariki Region 2008 – 2010

No	Needs	Gaps	Trends	Priorities
<b>8 Geothermal Applications</b>				
4.2.12	Optimise use of local unique thermal geo-physical resources and Māori land and asset ownership	<ul style="list-style-type: none"> <li>• Development of Māori management skills for land and natural resources are in short supply</li> <li>• Corporate governance skills to be combined with asset management in a culturally sensitive environment</li> <li>• Limited cross contribution between iwi, private and government/corporate thermal planning and facilitation</li> <li>• Limited workforce available with training in thermal powered systems for energy and heating in horticulture, aquaculture and other primary food products</li> </ul>	Increasing wish by iwi to gain greater income from settlement thermal resources in sustainable culturally sensitive business frameworks, with growing regional awareness of potential is driving development of opportunity	<p>Regional recognition with integration to facilitate building local knowledge base to resource skills and engage all parties in training design to meet local cultural needs ahead of planning content and delivery</p> <p>Learning from existing small number of operators and growing sustainable employment with tertiary sector integrated into the planning and facilitation</p>

Regional Statement - The Wairariki Region 2008 – 2010

**4.3 Niche Areas Demanded by Sub-regional Resources**

No	Needs	Gaps	Trends	Priorities
<b>South Waikato (Tokoroa, Mokai, Putaruru, Tirau)</b>				
4.3.1	Increased labour to meet growing demand in water based industry	Shortage of labour for water usage employers, including aquaculture, thermal spa industry & bottling	Niche tourism and commercial opportunity based around unique resources has growing demand	Integration into regional niche tertiary plans with resources available
4.3.2	More quality retirement facilities with caregiver/ support services	Labour shortages in retirement and health carer services especially in area accessed from Hamilton	Aging population wishing to enjoy rural facilities in a safe environment	Training skilled aged person caregivers to operate alongside new real-estate developers
<b>Eastern Bay of Plenty (Whakatane, Kawerau, Opotiki)</b>				
4.3.3	Local settlements recognised and opportunity embedded into local industry potential	Coastal and Maritime Aquaculture	Demand for greater local participation and benefit from asset base	Integration into regional niche tertiary plans with resources available
4.3.4	Foreshore and Maritime Conservation and Ecology business growth opportunity captured	Limited supply of employers and staff for ecologically sustainable business in a new sector of the local economy	Awareness growing in the community for potential ecologically sustainable systems in marine and aquaculture business	Integrated planning and resourcing of local training providers including training trainers
4.3.5	More quality retirement facilities with caregiver/support services	Limited people with necessary skills and motivation combined with sustainable business incomes for retirement and health services especially in Coastal Zone	Aging population wishing to enjoy maritime climate in a safe environment in monitored and freehold accommodation	Training skilled aged person caregivers to operate alongside new real-estate developers
<b>Taupo Region (Mangakino, Turangi, Taupo, Wairakei)</b>				
4.3.6	Renewable energy specialists to grow, harvest and process crops with support equipment knowledge and service skills	Limited local skills available to drive up Biofuels initiatives	Greater international awareness and drive towards Kyoto protocols with NZ needing to replace fossil fuel with carbon friendly products opening new opportunity for bio-fuel value chain products	Integration of training sector with business planners and research sector to determine training outcomes desired and design courses to meet local need

Regional Statement - The Wairariki Region 2008 – 2010

No	Needs	Gaps	Trends	Priorities
<b>Rotorua (Central Bay of Plenty, Lakes Region, Edgumbe, Te Puke, Mamaku Plain)</b>				
4.3.7	Commercialisation of Intellectual property to meet market opportunity	Limited opportunity to exploit wood based biotechnologies – fuels and novel materials due to lack of knowledge in industry sectors	Output from SCION and other Crown Research enterprises growing related to the regional and national business and tertiary opportunity	Recognition by tertiary sector and government of new opportunity matched by curriculum development and skilled trainers
4.3.8	Skilled workers in metal, wood and plastics-biomaterials for construction and manufacturing sectors	Engineering skills gaps in industry support sectors	Growing opportunity to supply domestic and commercial markets with new products requires skilled and technology enabled staff for new and existing business opportunity	Meet local needs to enable sector to grow by establishing partnerships with ITOs and new emerging sectors and relevant curricula
4.3.9	Commercialisation skills from new research output and IP development	Limited commercialisation expertise for new intellectual property to meet market opportunity	Output from SCION and other applied research enterprises growing related to regional and national business and tertiary opportunity	Commercialisation training and mentoring for aspiring entrepreneurs combined with network strengthening for incubation and training support

## **Appendices**

**Appendix 1: Members of the Writing Group**

**Appendix 2: Attendance at Regional Meetings and Contributors to  
Feedback on Circulation Draft**

**Appendix 3: References and Documentary Evidence Quoted**

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## Regional Statement - The Wairariki Region 2008 – 2010

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### Appendix 3: References and Documentary Evidence Quoted

Footnote No	Description
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