Wellington Regional Economic Development Plan 2022 – 2032

REFRESHED IN 2024 V2

Wellington
Regional Leadership Committee

About the Wellington Regional Leadership Committee (WRLC)

WRLC members have partnered to achieve better shared outcomes for Te Upoko o Te Ika. Our region faces many cross-boundary growth-related challenges. By joining forces, we can solve our regional challenges, maximise our potential, improve existing communities and develop new communities to be places where we all want to live and work.

The WRLC provides a platform to positively influence and drive the region's future, unlock opportunities and address shared challenges. We have two inter-dependent areas of responsibility:

1. Regional spatial planning – the Future Development Strategy
2. Regional economic development.

We are looking at change from a systems-level, covering all inter-related aspects that underpin how we live and work. These include housing, infrastructure, transport, iwi/Māori housing, climate change, resilience and economic development. The WRLC recognises that to progress regional economic development there needs to be a new approach and a more dynamic and collaborative plan. We are focusing on better co-ordination and alignment across our region, to build a better future, together.

Photos on cover: Top middle: Flying Saucer | Top right: Capture Studios
Centre left: Mark Tantrum | Centre middle: Jet Productions
Centre right: Mark Tantrum | Bottom right: Capture Studios

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Foreword

Our region's economic future

We are proud to present the refreshed Wellington Regional Economic Development Plan (REDP). We have completed a refresh to ensure the initiatives in the REDP are current, relevant and support the growth in jobs in targeted sectors within the region.

The Wellington Regional Leadership Committee (WRLC) is a union of councils, iwi and central government in the Wairarapa-Wellington-Horowhenua region. The WRLC were formed to work together to positively shape the future of the region. The REDP covers this same geographical area.

The REDP was originally developed in 2022. Over the past two years, the REDP has provided a vision "to build a future-focused thriving region for all to be proud of." During this time, employment in the Wairarapa-Wellington-Horowhenua region has increased by 6% while national figures have increased by 5%.[1]

Our approach focuses on:

- Acceleration of key sectors to build on our competitive advantage and future opportunities. Sectors we will focus on are screen, creative and digital; science, technology, engineering and high-value manufacturing; visitor economy; and primary sector, food and fibre
- Acceleration of key enablers to build from solid foundations. These enablers are Māori economic development; skills, talent and education; water accessibility and security; and resilient infrastructure.

At the heart of the REDP is an agreed set of initiatives that will enable us as a region to achieve our vision, strategic objectives, growth and employment. These initiatives have received unified support from the WRLC to help grow jobs and emphasise the importance to our region. They will continue to be reviewed by the committee on an ongoing basis to ensure the focus on relevant sectors remains strong.

It has been pleasing to see the region working together to implement initiatives from the plan. We remain true to the REDP vision and approach. Our refreshed REDP builds on the successes and learnings from the past two years, to ensure each chapter continues to identify issues and opportunities that are current, and the right set of initiatives to address them. The REDP aligns with Te Tirohanga Whakamua, a statement of iwi and hapū values and aspirations for urban development for the Wairarapa-Wellington-Horowhenua region, which was created in 2023 as part of the regional Future Development Strategy.

This REDP was shaped with input and critique from partners and stakeholders, including through workshops and one-on-one meetings. It was developed through a joint local government, central government, iwi and economic development partners' steering group. The refresh has been undertaken with help from the same steering group and wider stakeholders. We thank everyone who has contributed to strengthening our plan and ensuring it reflects the latest context.

Successful implementation continues to be a job for us all. Progress is summarised in an annual report each year. We will continue to drive implementation and to continuously improve the plan to ensure all partners are working towards the best possible outcomes for our region.

DARRIN APANUI (CHAIR) **AND DARAN PONTER** (DEPUTY CHAIR)

WELLINGTON REGIONAL LEADERSHIP COMMITTEE

Moemoea for the people of Te Upoko o Te Ika

Ka eke ki te taumata ikeike o Rangiatea

Ascend the highest summit of potentiality

This whakatauākī encourages individuals to set goals and to strive to the best of their ability. This is relevant for everyone residing in the takiwā (region), including mātāwaka - or Māori of other iwi and kāinga - and all cultures who have chosen Te Upoko o Te Ika as their home. Many whānau have contributed to our marae and the repatriation of our cultural practices, and to us as uri of the mana whenua. We acknowledge these relationships and the care we feel for their uri also.

Our expectation is that our takiwā is a positive place for all to reside. We see that the strengthening of mana whenua supports all to thrive – including Māori, uri of Te Moananui a Kiwa, and all other nations. It is difficult to manaaki manuhiri when you are not at full potential or with thriving wellbeing.

'Rangiatea' is a name of a building that resides in the uppermost heaven where the 'mareikura' and 'whatukura' resided. It is important to note that every iwi will have their own narratives, based on their respective whare wānanga as it highlights in the following saying 'Tō piki amokura nōu, tōku piki amokura nōku'.[2]

Te Ahi kā roa tupua rau, he auripo i te manga nui, he kaitiaki ki te whenua

The Ahi kā roa of many phenomena, a ripple in the great water tributaries, a guardian on the land

Ahi kā is a reference to the fire that one must keep burning on their whenua, as a symbol or sign of their occupation of that whenua. Ahi kā is a metaphor too for the home people of the pā, who keep the home fires burning. The word 'kā' means to burn, kāinga which means home, derives from the kupu 'kā' - so another rendering of kāinga means 'where the fire burns' - where the ahi kā burns.

The ahi kā of the pā keep the ahi burning so when one returns home, they feel the warmth of the ahi, the warmth of our whare, the warmth of the wharekai.

As Māori it is important for whānau to make an effort to return home, more often than 'once in a while' - and not just for tangihanga. It is also important for them to take their tamariki and mokopuna so that they have a sense of belonging. It is our responsibility to continue to keep the 'ahi kā' going from one generation to the next, so that our children and mokopuna continue to carry on the roles and responsibility of 'ahi kā'. If our tamariki or mokopuna do not feel the warmth of the ahi, it is our responsibility to get them closer to that fire, to bring them home and remind them of the responsibility as 'ahi kā roa'.

KURA MOEAHU

Tiamana/Chairman of Te Rūnanganui o Te Āti Awa ki te Upoko o Te Ika a Māui Inc

Photo: A Waka Odyssey, 2018 New Zealand Festival. Photo by Matt Grace

Interlinking strategies in Te Upoko o Te Ika

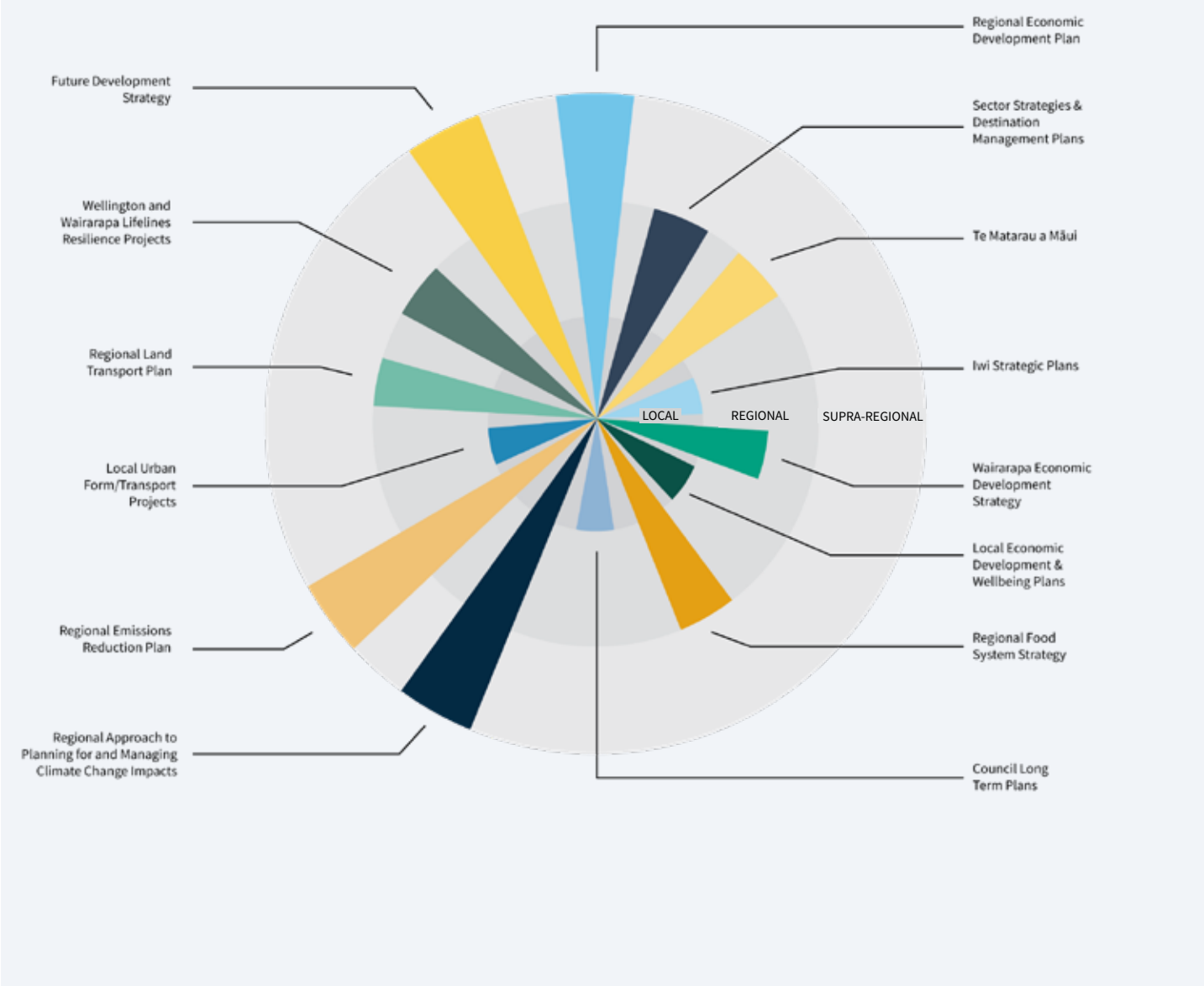
We must consider how our plan is positioned and its relationship with other strategies and plans across the wider region with economic impacts.

This diagram highlights the importance of agencies working across boundaries to ensure that strategies and plans integrate, information sharing occurs, and we achieve scale when collaborating on regional and national economic development projects. It is not a hierarchy but rather shows the link between those plans, our local communities, and how they support and intersect with each other.

The Future Development Strategy and Regional Economic Development Plan sit in the supra-regional sphere. This includes territorial authorities and iwi across our region as well as central government.

At a regional level we include Te Matarau a Māui, Destination Management Plans and the Regional Land Transport Plan as reflecting the scope of our whole region. Sector strategies of relevance are included as one grouping. There are also several sub-regional plans, providing regional benefits across localities but with a narrower geographic focus, such as the Wairarapa Economic Development Strategy.

There are then local plans which remain important though governed at local level. Importantly, these include any local economic development or wellbeing plans and council long-term plans, district plans and iwi strategic plans.



Purpose

Our Regional Economic Development Plan guides the long-term direction of our economy. It identifies issues and opportunities in key focus areas and helps prioritise initiatives to contribute towards creating decent jobs for our growing population and continuously improving quality of life in our region.

We aim to help:

1. **Create some of the 100,000 new decent[3] jobs needed in our region over the next 30 years because of the expected increase in population**
2. **Improve quality of life by supporting our region to be more productive, resilient, inclusive and sustainable with thriving Māori and Pasifika communities.**

We do this by elevating initiatives that will make a difference from a regional or sub-regional perspective. These complement rather than replace individual local development plans and generally require alignment of multiple councils, iwi, business stakeholders and central government.

We heard a strong emphasis on the need for action while engaging with a range of stakeholders and iwi. This plan is a cluster of opportunities and the concrete steps which, if pursued together, will boost the prosperity of our region. It is both a strategy and an economic action plan – with enough detail to guide and enough vision and direction to lead.

The plan is a living document that continues to evolve and adapt as conditions change, relationships are built, and new initiatives come to the surface that address some of the issues and opportunities identified. We refresh this plan every one to two years to maintain momentum and focus. Having a well-connected region with an agreed plan helps us and potential funders know what regional priorities require support.

This is about building a better future for our residents and our region, the place we call home.

Photo: Jet Productions

Introduction

One of six strategic direction areas identified in the Future Development Strategy (FDS) is providing opportunities for productive sustainable local employment.[4]

As our regional population grows, we'll need more decent jobs closer to where people live, along with infrastructure, affordable housing and sustainable transport networks.

We're expecting an additional 200,000 people living in the Wairarapa-Wellington-Horowhenua region in 30 years' time, leading to a need for about 100,000 more jobs. This would equate to a regional population of 780,000 people, however there is no certainty as to if or when this may occur.

How the plan was developed

Our plan has been created on behalf of the region by WellingtonNZ as the regional economic development agency, in partnership with representatives from across central and local government, iwi and business. The process included the following:

- In mid-2021, Henley Hutchings analysed more than 300 documents and data sources[5] that relate to economic development to identify sectors, enablers and areas of alignment to provide the foundations for our plan
- In October 2021, a steering group made up of representatives from across central and local government, Māori economic development and business was formed to lead the development of our plan, guided by the central government PRISM Framework[6]
- Te Matarau a Māui representatives led development of the Māori economic development chapter and supported the alignment of our plan with the Te Matarau strategy. Local rangatira Kura Moeahu and AATEA Solutions Director Hinerangi Edwards supported the steering group to ensure our plan reflected learnings through the lens of mana whenua
- There were many engagements and discussions across our region to identify the overarching Wellington regional economic development framework and key focus areas, clarify the issues and opportunities, and gather information on potential initiatives to make a difference
- In April 2022, we received independent advice from Martin Jenkins for consideration, including data analysis, key trends, drivers and strategic uncertainties. The Martin Jenkins Independent Review and Advice – Final Report 11 April 2022 formed the bases of the statistics originally referenced in this plan.[7] A regional snapshot with data and insights from when this report was developed is available on our website
- We agreed to focus on areas that can be influenced in key sectors to build our competitive advantage and key enablers to create solid foundations for building our diverse regional economy
- The steering group members and WellingtonNZ staff then developed the chapters for each key focus area, informed by their collective business networks and industry knowledge
- In 2022, the WRLC approved the original REDP, including the overarching Wellington regional economic development framework and initial set of 33 initiatives
- In 2023, four new initiatives were added to address some ongoing issues and opportunities
- In 2024, the plan was refreshed and relaunched to reflect the latest data, context, and progress on initiatives. The refresh was informed by steering group members and WellingtonNZ, once again using their collective business networks and industry and local knowledge. The refreshed plan focuses on a refined set of 31 initiatives
- In 2025, two new initiatives were added to address further ongoing issues and opportunities.

Photo: Te Papa

Regional summary

Our region is an important location for Aotearoa and New Zealanders. Wellington is the head of the fish of Maui, the harbour – Te Whanganui-a-Tara and Wairarapa Moana are the eyes of the mythical fish, and the great bay between them is the fish's mouth.

Māori have lived in Te Upoko o Te Ika since the time of Maui, Kupe and Whātonga. More than 90,000[8] live in our region today, constituting more than 15% of the region's population.[9] Sixteen percent affiliate to one or more of the mana whenua groupings of Ngāti Kahungunu ki Wairarapa, Taranaki Whānui ki te Upoko o Te Ika, Ngāti Toa Rangatira, Te Ātiawa ki Whakarongotai, Ngāti Raukawa ki te Tonga, Muaūpoko and Rangitāne o Wairarapa.

Our region has strong cultural connections, with more than 20 marae and 39% of Māori adults speaking some Te Reo. Māori-owned entities play a key role in commercial property, housing and social developments, and Māori in business have a strong presence in the screen, technology, business services and food and fibre sectors. Mātauranga Māori knowledge and Te Ao Māori perspectives have an increasing and important role to share knowledge and support better outcomes for all.

With an abundance of opportunities, our region offers a great lifestyle for our 588,050[10] residents. Our population has grown by nearly 7,000 residents over the last two years, primarily as a result of international migration. With an average annual population increase of 1.3%, our region looks set to meet the projected regional population of about 780,000 in 30 years.

Our region is culturally, economically and geographically diverse, and our cities, towns and transport networks are shaped by stunning natural landscapes, including rivers, harbours, hills, ranges, valleys and coastlines. In 2023, our regional GDP was estimated at about $51.48 billion,[11] about 13.7% of the national economy, and our region provided around 334,834[12] jobs, or 12.2% of national employment.

Our region has seismic resilience challenges, with a higher risk of exposure to earthquakes compared to the rest of New Zealand, and ongoing discoveries of structural vulnerabilities.[13] This impacts the insurability of our buildings and makes achieving compliance with regulatory requirements challenging. It is therefore uneconomical to complete the required strengthening and repair work on some buildings. A significant earthquake would create serious economic and social disruption for our region and beyond, and we need to proactively enhance our resilience, where possible, to reduce risk to our economy.

We have a strong base of innovation and technical skills, with 46.5%[14] of our workforce employed in knowledge-intensive occupations compared to a national average of 32.9% in 2023. We also have the largest research, science and innovation workforce in the country. Our industry make-up and relatively high levels of education mean we are well-placed to adapt to changes in the future of work.

Wellington, as the capital of New Zealand, is home of Government and associated professional services which make up a quarter of jobs in our region. As a result of the Government seeking a 6.5% to 7.5% reduction of expenditure in 2024, the public sector has been experiencing job losses. That may see a shift in the make-up of our regions' employment or a redeployment of these roles into other professional services. While this is likely to negatively impact jobs in our region in the short term, our plan continues to leverage our capital city status and focus on key sectors and enablers that can be influenced to shape our diverse regional economy.

The key sectors of focus identified in the research were validated with industry and our steering group, and include screen, creative and digital; science, technology, engineering and high-value manufacturing; visitor economy; and primary sector, food and fibre.

Performance of our key sectors, and therefore our region, depends on the quality of the underlying enablers of prosperity and wellbeing. The key enablers include Māori economic development; skills, talent and education; water accessibility and security; and resilient infrastructure.

Successful enterprises of all sizes and sectors have started out in our region, including Wētā Workshop, Sharesies, Hnry, Fraser Engineering, Port Nicholson Fisheries, Kāpiti Island Nature Tours, Whittaker's, Farm Focus, Merino Kids, Storypark, Goodnature and more. Innovative and high-value businesses excelling in global markets are key to our region's success, and we want to enable enterprises like these to continue flourishing while supporting new startups to establish and grow into market leaders.

A summary of our region, based on the data, key trends, drivers and strategic uncertainties, is included over the page. A more detailed regional snapshot and references to supporting evidence from when the REDP was first developed is available on our website, and the latest data is included in our annual summary each year.

Our region has:

- High levels of earnings and incomes. In 2023, the mean annual earnings ($81,064) and mean household income ($138,861) in our region were higher than national levels ($74,754 and $127,423 respectively)[15]
- High productivity levels, at $153,733 compared to $137,196 nationally (2023 estimates from GDP per filled job)[16]
- A lower emissions profile than other comparable regions (Auckland and Canterbury). However, evidence shows that increasing greenhouse gases are contributing to higher temperatures and that our region is particularly vulnerable to the economic and environmental impacts of climate change, so we must do our bit to lower emissions. Moving to a low emissions economy means reducing carbon dioxide (CO2) emissions produced or consumed by our regional economy to an acceptable level. Transport accounts for the largest share of our emissions, followed by agriculture and then stationary energy. Industry and waste account for less than 5% of our region's total emissions respectively
- A successful capital city that has flow-on benefits across our region. We can be proud that Wellington, as our capital city, was ranked:
    - 7th safest major urban area in the world in The Economist's Safe Cities Index 2021,[17] which considers digital, health, infrastructure, personal and environmental security
    - 23rd most liveable city in the Global Liveability Index 2023, by the Economist Intelligence Unit, ranked as the biggest mover, up from 50th in 2022[18]
    - 35th out of 200 on the Innovation Cities Index: Small 200 Cities in 2022-2023.[19] The Innovation Cities Index measures and compares cities across all business innovation, including sustainability, technology/ digital, entrepreneurship and many more indicators.

We also have:

- A high quality of life. In 2022, 88% of our region's residents rated their quality of life as positive compared to the national average of 83%. However, only 54% of residents reported having enough or more than enough income to meet their everyday needs in 2022.[20] The ability to meet everyday needs is likely to get worse as the cost-of-living increases, global supply chains are affected by international conflicts and political uncertainty leading to global consequences
- Regional disparities. For example, Wellington city contributes more than 61% of GDP and has high mean earnings ($91,874) with all other territorial authorities' areas having mean earnings lower than the New Zealand average[21]
- An unemployment rate of 3.1% in 2023 (down from 4.5% in 2021), just below the New Zealand rate of 3.3%. Unemployment represents unfulfilled potential in our region. Unemployment and underutilisation vary considerably across the region with Māori and Pasifika experiencing higher levels of unemployment and Pasifika having lower labour participation compared to European and Asian people. For example, in 2023 the unemployment rates in our region were 5.1% for Māori (7.9% in 2021) and 3.7% for Pasifika (7.5% in 2021), compared to 3.1% for all ethnicities (4.8% in 2021). Horowhenua, Porirua and Wellington city have relatively high unemployment rates compared to other territorial authorities in our region. Our plan aims to address these variations through helping to reduce disparities [22]
- With nearly six out of 10 jobs in the capital being knowledge intensive, Wellington city is New Zealand's most knowledge-intensive territorial authority. The concentration of the public sector in Wellington city contributes to its high proportion of knowledge-intensive jobs. Even when excluding public sector roles, our region's key employment sectors remain highly knowledge-intensive. Knowledge-intensive industries are those in which the generation and use of knowledge play the predominant part in the creation of economic activity. Three of our territorial authorities feature in the list of Top 10 Knowledge-Intensive Territorial Authorities in NZ – Wellington city first, with Porirua fourth and Lower Hutt seventh.[23]

HIGH LEVELS OF EARNINGS AND INCOMES

Our mean household income was $138,861, compared to $127,423 nationally in 2023

HIGH CONCENTRATION OF KNOWLEDGE INTENSIVE JOBS

35TH ON THE INNOVATION CITIES INDEX

GDP PER CAPITA ABOVE THE NATIONAL AVERAGE

23RD MOST LIVEABLE CITY IN THE WORLD

LOW EMISSIONS PROFILE

Compared to similar regions like Auckland and Canterbury

HIGH PRODUCTIVITY LEVELS

At $153,733 compared to $137,196 nationally in 2023

HIGH QUALITY OF LIFE

88% of our region's residents rated their quality of life as positive

WELLINGTON

REGIONAL ECONOMIC DEVELOPMENT PLAN

LIVEILLUSTRATORS.COM

Overarching Wellington regional economic development framework

Ngā moemoea Vision

To build a future-focused, creative, sustainable and thriving Wellington region for all to be proud of

Ka eke ki te taumata ikeike o Rangiatea | Ascend the highest summit of potentiality

Ngā pou Strategic Objectives

- To be a leader of change using our competitive advantage in key sectors
- To build a prosperous and creative region to improve our quality of life
- Te Ahikāroa will enhance and empower the takiwā of Te Upoko o Te Ika
- To build our workforce and resilience in our infrastructure to support economic development
- To support a transition to a low emissions economy and responsibly manage our natural resources for future generations

Ahunga Approach

- Acceleration of key sectors to build on our competitive advantage and future opportunities
- Acceleration of key enablers to build from solid foundations

Ngā mahi Focus areas/ actions

- Screen, creative and digital
- Science, technology, engineering and high-value manufacturing
- Visitor economy
- Primary sector, food and fibre
- Māori economic development
- Skills, talent and education
- Water accessibility and security
- Resilient infrastructure

Vision

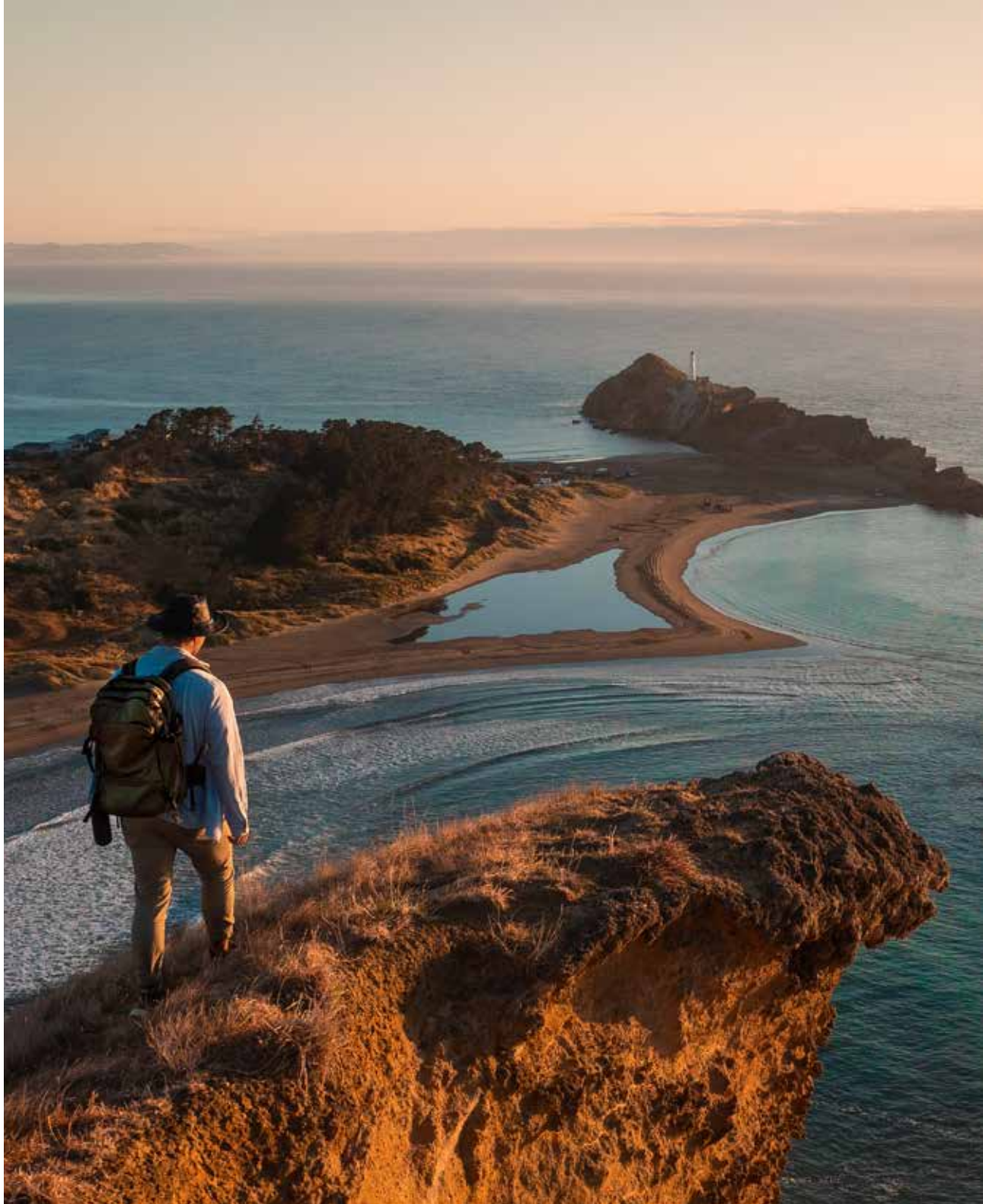
OUR VISION IS

"to build a future-focused, creative, sustainable and thriving Wellington region for all to be proud of."

We are collectively aiming for an entirely better life and world in its broadest sense for all our children and mokopuna. Our vision is based on feedback from the Wellington Regional Leadership Committee, iwi and communities. The reason for each aspect is:

- **Future-focused** – We are a region full of aspiring leaders with a drive for positive change locally, nationally and globally
- **Creative** – Creativity is in our DNA, as demonstrated through our creative arts, events, food, fibre, technology and manufacturing
- **Sustainable** – Our region is vulnerable to the economic and environmental impacts of climate change and we support a transition to a low emissions economy
- **Thriving region for all** – We recognise disparities exist across our sub-regions and ethnicities, and aim for our region to be inclusive to all, so every resident enjoys a high quality of life and good overall wellbeing.

All communities require economic health and development to thrive. A resilient and diverse economy is one where community members have choices, access to decent jobs and wages, and employment prospects over the long-term.



Strategic objectives

After careful consideration of the opportunities and challenges we have heard about, we have decided on five broad strategic objectives of importance across our region.

1.

To be a leader of change using our competitive advantage in key sectors

Through innovation, partnerships and supporting our diverse sectors we will enable our region to be internationally competitive and highly productive, therefore contributing to our positive global reputation.

2.

To build a prosperous and creative region with improved quality of life

We recognise our urban and rural potential, as well as variations in wellbeing across our region, and seek to create an enabling environment for the positive standard of living we all aspire to. While our regional economy performs strongly in some areas, there are wide disparities, especially for Māori and Pasifika.

3.

Te Ahikāroa will enhance and empower the takiwā of Te Upoko o Te Ika

Ahikāroa are those who stoke the home fires, overseeing the cultural vibrancy of their respective takiwā. Initiatives including those led by Te Matarau a Māui, mana whenua and mātāwaka will support Māori to thrive and lead to greater outcomes for all in our region.

4.

To build resilience in our workforce and infrastructure to support economic development

We need to attract, retain and develop our workforce to meet increasing demand and grow our industries. By developing resilient infrastructure, we create new opportunities and minimise impact to our regional economy from future disruptions such as earthquakes.

5.

To support a transition to a low emissions economy and responsibly manage our natural resources for future generations

We have an opportunity to be a national leader in the deployment and adoption of climate change technology.

We support initiatives that lower overall carbon emissions, to protect the wellbeing of the people and environment in our region both now and in the future.

Approach

To deliver our agreed objectives, our plan focuses on two key areas:

1. **Accelerating key sectors to build on our competitive advantage and future opportunities**
   The following sectors have been identified because of potential growth opportunities, annual average growth over the last decade, creation of skilled employment, and contributions to our regional identity. These sectors are:
   - Screen, creative and digital
   - Science, technology, engineering and high-value manufacturing
   - Visitor economy
   - Primary sector, food and fibre.

2. **Accelerating key enablers to create solid foundations for building our regional economy**
   The following enablers have been identified because they unlock, leverage and build resilience in our businesses, iwi and communities. These enablers include:
   - Māori economic development
   - Skills, talent and education
   - Water accessibility and security
   - Resilient infrastructure.

We have focused on key sectors and enablers that can be influenced to shape our diverse regional economy. Other sectors have been considered such as central government and professional services, but their size and potential growth are mainly influenced by factors outside of our region's control.

Health and construction are also potential growth sectors, though opportunities are largely workforce-related.

To achieve our vision, we need to remain inclusive, innovative and future-focused. Implementation will require contributions from central and local government, iwi and hapū, businesses, education and research providers, and our wider communities.

Sectors and enablers

Each of the sectors and enablers have different contexts, complexities, opportunities, issues and stakeholders. The following chapters have been developed with a focus on outlining the issues and opportunities to set direction. The initiatives were reviewed against multiple criteria by an assessment panel, endorsed by the steering group and considered to be projects that, with support, can generate positive action.

The economic development targeted rate collected by Greater Wellington Regional Council will be used to administer the plan and activate some projects, such as validating the case for investment or co-funding initiatives to leverage other complementary funding from private investors, local and central government.

The initiatives included in each chapter will help to create new jobs and achieve the strategic objectives. We expect other initiatives that address the issues and opportunities to be included in the future as they are identified. The initiative tables include estimated timeframes and stages that range from planning and research through to developing business cases, attracting investment and project delivery. Project leads are expected to undertake detailed planning and manage effective projects or programmes.

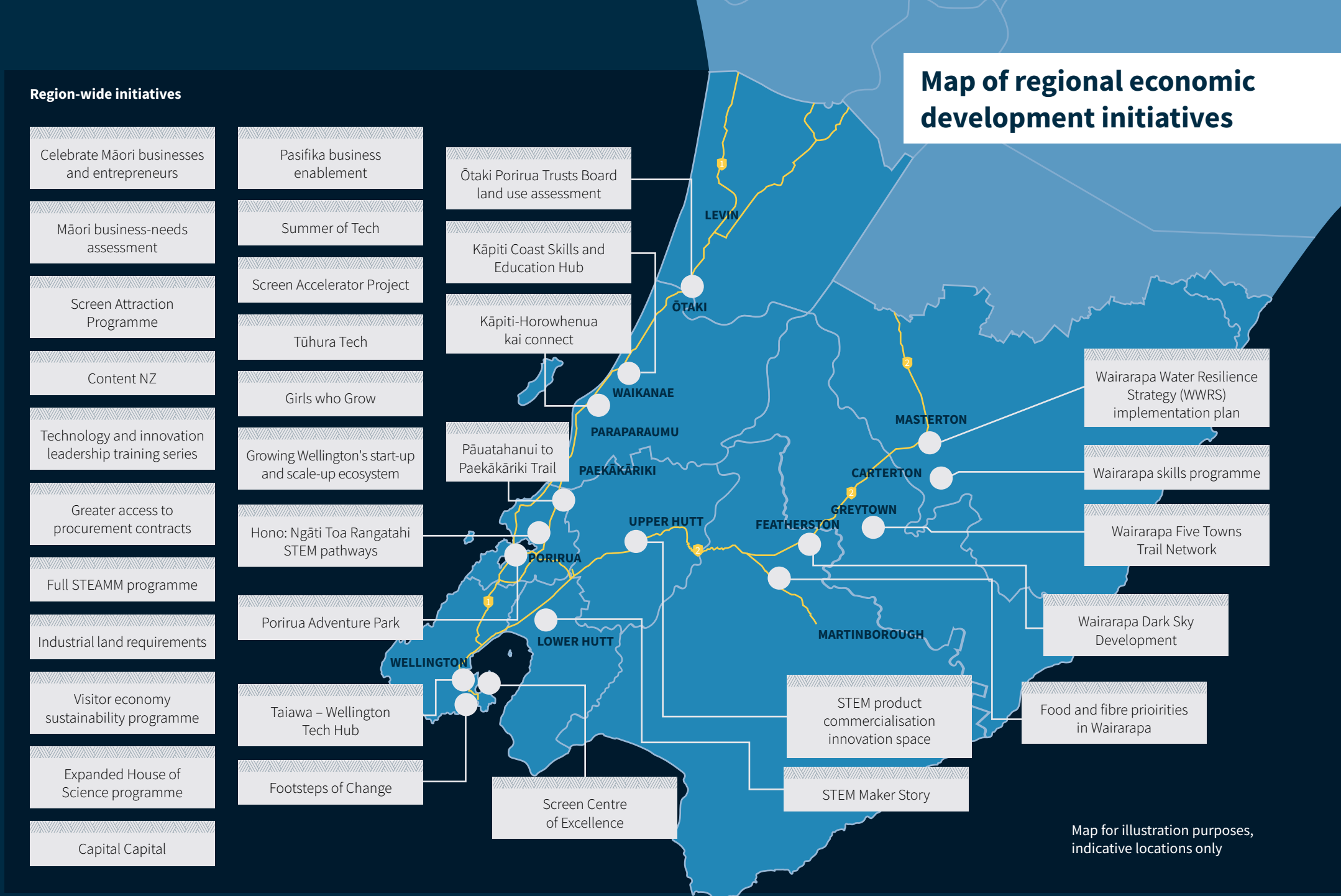
Icons are used to indicate which of our strategic objectives (SO) each initiative contributes to, based on the key to the right.

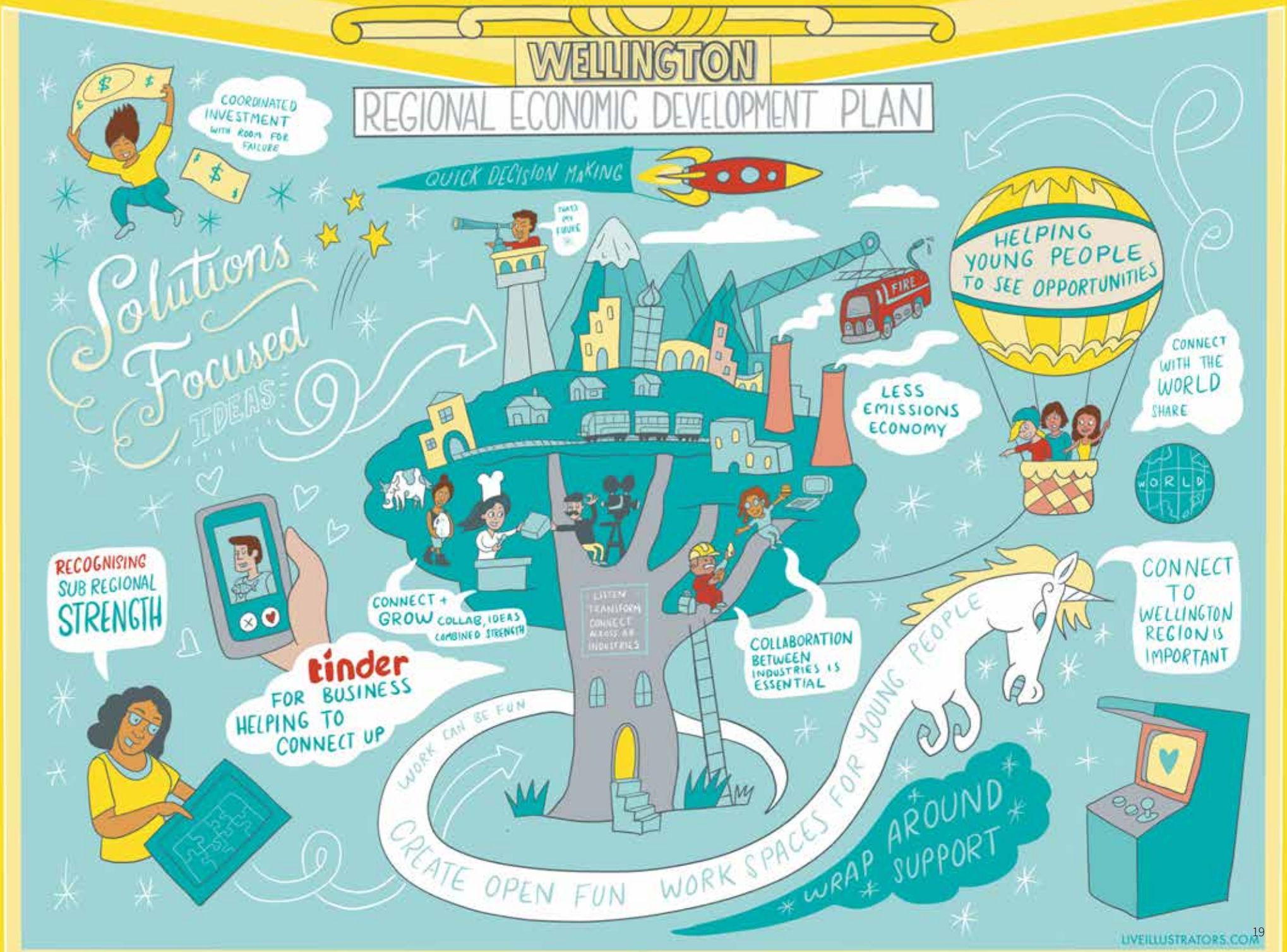
- Be a leader of change using our competitive advantage in key sectors
- Build a prosperous and creative region to improve our quality of life
- Te Ahikāroa will enhance and empower the takiwā of Te Upoko o Te Ika
- Build our workforce and resilience in our infrastructure to support economic development
- Support a transition to a low emissions economy and responsibly manage our natural resources for future generations

The following map indicates how the initiatives are spread across our region. While some initiatives are place-based, each initiative has been identified as an opportunity that will have a positive impact across our region.

Several initiatives focus on shared spaces, centres of excellence or innovation hubs. These are recognised approaches[24] to enable firms to develop and commercialise value-added products or services for local and export consumer markets, share learnings and support innovative Kiwi businesses of all sizes to grow.[25]

Map of regional economic development initiatives




WELLINGTON
REGIONAL ECONOMIC DEVELOPMENT PLAN
COORDINATED INVESTMENT WITH ROOM FOR FAILURE
QUICK DECISION MAKING
Solutions Focused IDEAS
HELPING YOUNG PEOPLE TO SEE OPPORTUNITIES
CONNECT WITH THE WORLD SHARE
WORLD
LESS EMISSIONS ECONOMY
FIRE
RECOGNISING SUB REGIONAL STRENGTH
CONNECT + GROW COLLAB, IDEAS COMBINED STRENGTH
tinder FOR BUSINESS HELPING TO CONNECT UP
LISTEN TRANSFORM CONNECT ACROSS ALL INDUSTRIES
COLLABORATION BETWEEN INDUSTRIES IS ESSENTIAL
CONNECT TO WELLINGTON REGION IS IMPORTANT
WORK CAN BE FUN
CREATE OPEN FUN WORK SPACES FOR YOUNG PEOPLE
WRAP AROUND SUPPORT
LIVEILLUSTRATORS.COM

SECTOR

Screen, creative and digital

EMPLOYMENT

8,442

GDP

$1.52b

The screen, creative and digital sector can be defined as companies and individuals creating narratives, content and ways in which it is consumed. Screen production covers film, television series, games, interactive media, animation, visual effects, sound and other storytelling processes and mediums. Then there is software and hardware platforms used for the creation and consumption of compelling moving images and associated content.

Our region has a proud history in the creatively and culturally important screen sector. We are best known as home to 'The Lord of the Rings' films, 'King Kong', 'Avatar', a globally-recognised visual effects, post-production and physical effects sector, and local television talent, including 'Flight of the Conchords' and 'Wellington Paranormal'. Gaming is an emerging area of growth and our region has a growing gaming industry which leverages the experience and facilities developed by our film effects expertise.

We have high quality purpose-built studios and directors and crew with experience working on high-profile and highly technical projects. We have one of the major global visual effects studios, Wētā FX, employing nearly 2,000 highly-skilled crew whose work generates export earnings and significant ripple effects across our regional economy. As one of our region's largest private sector employers, Wētā FX operates in a highly competitive and mobile international sector, with a talent base in high demand around the world. Many of the company's crew have gone on to create innovative products and businesses in our region and around New Zealand.

Our two universities, Victoria and Massey, are heavily invested in training the next generation of film-makers, and both have cutting-edge facilities for student and commercial projects.

Massey has recently launched the National Academy of Screen Arts. Our national drama training institution, Toi Whakaari, is also headquartered here. We also have a rich array of locations including beaches, wilderness, mountains, industrial and suburban, which can be accessed within a short drive from our studios.

Wellington is a UNESCO City of Film, which provides the sector with a competitive advantage that benefits our region. In a 2022 survey, 71% of Wellington businesses agreed that we need to leverage our capital city status to attract more visitors and tell our national and local stories.[26] The UNESCO Creative Cities programme and its network promote, demonstrate and reinforce the role of creativity as a catalyst for building more sustainable, resilient and inclusive cities. The programme improves access to, and participation in, cultural life as well as the enjoyment of screen culture, goods and services, notably for diverse, vulnerable groups and individuals.

While the screen, creative and digital sector generated $1.52b of GDP for our regional economy in 2023,[27] our region has become the centre of New Zealand's digital and gaming community over the last two decades. This is due in part to our innovative and successful screen industry, which generates $260m GDP and employs 17% of the nationwide screen sector workforce.[28]

The screen sector's growth in our region has mainly been in post-production. A Wellington Regional Screen Sector Strategy[29] has been developed to encourage higher performance for employment, earnings, and productivity. The strategy identifies an opportunity for an additional 680 decent jobs and $88m GDP to be created for our regional economy.

Issues and opportunities

There are six key issues and opportunities to grow and maintain a sustainable and thriving screen sector.

1. Industry stability to grow and scale – The sector is predominantly made up of small, fee-for-service-based businesses operating within a work stream of larger but intermittent projects. The cyclical and unpredictable nature of these projects means a lack of continuous work, producing significant uncertainties over workflow and therefore making the sector unstable. This can create an inability to plan and retain talent, which limits growth and keeps the sector in a state of constant reaction.

Investment into the early-stage development, creation and export of local intellectual property will lead to companies of scale with international partnerships and the ability to create new, high-value opportunities and economic returns beyond one-off projects. Support is required to provide these businesses the resources and infrastructure they require. Support is also needed to establish new sources of public and private funding to enable more diverse projects to take off, new business models to thrive, and more talent to be sustained in the sector.

2. Improved co-ordination – Our screen sector needs to improve its alignment and co-ordination because it has the potential and reputation to be a beacon for content and innovation for the world. A better-connected ecosystem will ensure opportunities are created for all areas of the sector, including research and development, export and investment partnerships, and education and training opportunities. Implementing the Wellington Regional Screen Strategy will help co-ordinate, unify and provide direction to the sector, stakeholders and opportunities of cross-collaboration between sub-sectors.

3. Raise awareness – Our region's unique screen sector offering needs to be better communicated to New Zealand and the world. Support is required to:

- Raise awareness of the value to our region and the New Zealand economy
- Raise awareness of our region's offering and the content produced here
- Partner with iwi and mana whenua to embed Te Ao Māori into the screen sector and develop new opportunities for indigenous storytelling
- Attract investment, suitable projects and build enduring export partnerships
- Attract, secure and retain talent to develop a robust workforce
- Raise the value of Wellington as a creative region to visit and live.

4. Improve access and ease of doing business – Sustained effort and investment is required to retain our 25-year film-friendly reputation and ensure our region remains known as an attractive and easy place to do business. A particular focus is needed to support local councils to make informed decisions on changes to land use, permitted activities and other related local government bylaws and directives, to ensure that screen production is supported and not adversely affected or restricted. Further iwi engagement is required to ensure regional sites of cultural significance are appropriately considered as part of filming activity.

More support is required to scale-up the sector, including connecting game development and interactive media opportunities to forge new frontiers in the convergence of film, gaming and interactive content mediums and technologies to create new, exportable intellectual property.

5. Attract and retain high-value workforce – Talent attraction has been increasingly difficult during the Covid-19 pandemic, and with borders reopened, talent retention is an added challenge. The successful growth of screen in other regions has led many crew and line producers to relocate permanently, making our region less attractive to international productions that rely on access to local talent. Jobs in this sector are high-value and rewarding, and there is an opportunity to promote careers throughout the pipeline from school age through to adults looking for a career change.

6. Public funding and support – The screen sector, at every level, draws on Government support through funding initiatives and rebate schemes to support local productions, assist talent development schemes, and enable co-investment into and attraction of international productions, post-production and visual effects work. Any significant changes to funding settings could have a major effect on the viability and sustainability of our region's screen sector over time so it can be viewed as both an opportunity and a risk.

For the screen sector to thrive, it is important our region retains a pipeline of international and domestic productions, and with this, further opportunities to develop local content, a retention of local crew and infrastructure and sustainability for the screen sector. Local government settings also play a part in influencing both the attraction and the development of new productions.

The six opportunities and the actions outlined in the initiatives can start to connect the nexus of storytelling, digital technology and business development opportunities to scale the sector for our region and New Zealand as a weightless, equitable and exportable industry.

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
		Strengthen and grow our regional screen sector				
	Screen Centre of Excellence Develop a Screen Centre of Excellence as a central, physical hub that allows all aspects of the creative and digital sectors to come together in a fully equipped 'weightless' business development and content creation facility, contributing to building the eco-system and addressing challenges and opportunities for the sector. As a UNESCO Creative City of Film, we recognise sustainable development is achieved through ensuring equitable access to opportunities	Grow the screen eco-system and generate support towards sharing a space	Massey University	Screen Wellington, WCC, GWRC, mana whenua, MBIE, MCH, private sector, Toi Mai WDC, tertiary institutes, CHQ, NZ Film Commission, NZ On Air	2022 – 2025	Delivery
		Develop a pilot programme for the Screen Centre of Excellence in partnership with public and private entities			2024 – 2026	Delivery
		Evaluate outcomes and success of the pilot and determine whether there is demand to continue the Screen Centre of Excellence with a sustainable operating model			2026 – 2027	Planning
	Screen Attraction Programme To support growth of the screen and gaming sectors in our region, we can help attract national and international projects, improve the ease of making a production or developing interactive content here, and support the development of our local producer, director, and game developer talent who are likely to create the next generation of Wellington region–made television, streaming service shows, films, and games. These initiatives will contribute to a steadier pipeline of work, helping to attract and retain a high-value workforce. As a UNESCO Creative City of Film, we facilitate film and game productions in a sustainable way that reflects the aspirations of mana whenua and their role as kaitiaki	Develop and deliver the screen attraction programme including famil trips for location scouts, marketing promoting why producers should consider our region, and promotion of the creative businesses that support the sector	Screen Wellington	NZ Film Commission, Screen and Creative Tech sector representatives, Regional Film Offices of New Zealand, local government, NZ On Air, NZ Game Developers Association	2022 – 2028	Delivery
		Develop and deliver the ease of business improvements programme including a searchable database of filming locations, a crew database that producers can use to find staff and an efficient permitting service			2022 – 2028	Delivery
		Establish regular stakeholder communications to improve coordination and receive input from the sector			2024 – 2026	Delivery
	Screen Accelerator Project Establish a series of workshops for screen practitioners at any stage in their career to develop their unscripted content ideas under the guidance of an Emmy award winning producer. This will support and coach our screen sector practitioners to commercialize their intellectual property, with the ultimate aim of bringing in productions to create jobs in the Wellington region and help put Aotearoa New Zealand on the map internationally in this genre. As a UNESCO Creative City of Film, we are supporting our people to tell their own stories	Secure funding, presenters, enrolments and resources required to deliver the Screen Accelerator Project, expanding on the successful pilot programme delivered in 2022	Tall Poppy Films and Avocado Entertainment	WCC, Screen Wellington	2023	Complete
		Deliver the Screen Accelerator Project including workshops, mentoring, creating sizzle reels, and pitching to domestic and international buyers			2023 – 2026	Delivery
		Evaluate feedback from the project and secure funding for the next 3-5 years			2026	Investment attraction

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
		Strengthen and grow our regional screen sector				
	Content NZ To build greater stability, grow local talent, and increase economic resilience, targeted investment is needed to stimulate homegrown intellectual property. New Zealand currently lacks a national screen market event that connects content creators with financiers, broadcasters, and streamers. This gap limits the ability of Wellington creatives to showcase intellectual property, attract investment, and build international partnerships. As a UNESCO Creative City of Film, we are developing a platform that supports indigenous-led projects, with targeted outreach to Māori and Pasifika storytellers	Complete a feasibility study to establish an annual screen market event in Wellington. Content NZ will serve as a professional event for local and international screen sector stakeholders, featuring market pitching, curated meetings, keynote sessions, and development labs for writers and creators	Screen Wellington	NZ screen funders, local festival organisations, industry guilds, tertiaries, industry vendors	2025 – 2026	Feasibility
		Should it prove feasible, develop partnerships for writer development, secure funding, confirm venue and format, and deliver the pilot Content NZ event			2026 – 2027	Delivery
		Evaluate the Content NZ event and plan to grow it for future years			2027 – 2030	Planning

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Photos: 1. Anna Briggs | 2. I, OBJECT. Scythia Films | Southern Light Films. Dir: Andrew Niccol

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WARNING
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SECTOR

Science, technology, engineering and high-value manufacturing (STEM)

STEM is a growing sector of importance for our region to support improved productivity and population growth. For the purposes of this plan, maths is included in all components of STEM and we have identified technology as a particularly strong focus area. These focus areas are outlined in the next two sub-chapters, with initiatives grouped together at the end.

EMPLOYMENT

29,521

GDP

$5.88b

Science, engineering and high-value manufacturing

With New Zealand long-known for a history of "Kiwi ingenuity", our region has carved a reputation for high-tech, high-value and manufactured design enabled by science, technical expertise, engineering skills and innovations in metal, plastics, composites and new materials. For example, Fraser Engineering[30] builds and distributes fire trucks to the world and WEBBCo[31] built the first all-electric zero emissions passenger ferry operating in the Wellington harbour.

The sector contributes $5.88b[32] to our regional GDP and accounts for about 29,521 jobs. Key contributors to GDP include computer systems design and related services $1.89b, engineering design $619.8m, scientific research services $306.5m, scientific testing and analysis services $115.7m, other machinery and equipment manufacturing $121.6m, and veterinary pharmaceuticals and medicinal product manufacturing $53.2m.

Our region has the largest research, science and innovation workforce in the country, with 4110 workers compared to Canterbury's 3961 and Auckland's 3830,[33] contributing to 22% of the entire research, science and innovation workforce. This is, in part, due to the concentration of universities and crown research institutes here. We are the main home of Callaghan Innovation, New Zealand's innovation agency which focuses on activating innovation and helping businesses grow faster for a better New Zealand. For example, the Innovation Quarter in Gracefield, Lower Hutt, is a high-energy environment with world-class, state-of-the-art facilities, workshops, pilot plants, labs and equipment, and has recently had significant investment in infrastructure.

High-value (advanced) manufacturing largely happens in the Hutt Valley and in the areas from Tawa to Levin. Science and engineering expertise is centred in Wellington city and the Hutt Valley with key sub-sectors focused on materials and equipment. This sector offers economic development potential across our region. For example, Lower Hutt has identified growing science, technology, engineering and manufacturing businesses will cement a local competitive advantage. Opportunities for industry include improved infrastructure and amenity for these businesses, including a product innovation accelerator, supporting partnerships to grow our workforce, and increasing research and development spend in these businesses.

Central government is prioritising genetic engineering, biotech, artificial intelligence and the space industries.[34] As of early 2024, Ministers were actively engaging with the STEM community to understand the issues and opportunities directly. The focus on advanced manufacturing is a clear objective of Callaghan Innovation in its current programmes, such as Industry 4.0, Lean Manufacturing and Digital Lean.

Issues and opportunities

We have an abundance of science and science research-orientated businesses to attract further talent and investment. Circular economy manufacturing provides real potential to add value. Industry 4.0 is becoming more pervasive, linking well with our technological strengths, and there is growing participation and leadership of Māori in these areas.

There are three key issues and opportunities to grow and maintain a sustainable and thriving science, engineering and high-value manufacturing sector.

1. Creating a visible ecosystem – The advanced manufacturing sub-sector lacks public recognition and support networks, in part because much of what we manufacture is an input into a domestic or global supply chain rather than a final retail product for the public. There are few large manufacturers in our region. Our region has a competitive advantage that can be leveraged by celebrating the success of small and medium enterprises to raise their profile, recognising local talent and supply chains, encouraging collaboration and innovation, and attracting future investments. The sector is progressing partnerships that will help to highlight current practitioners in our region.

2. Skills shortages – This sector has an ageing workforce and high levels of skill shortages, which is compounded by the adoption of Industry 4.0 practices that require higher levels of digital technologies knowledge. To adapt to these challenges, the manufacturing sub-sector is increasingly seeking workforce directly from secondary schools. About 31% of all jobs in New Zealand are at a high risk of automation, possibly within the next 20 years. Wellington city has the highest proportion of jobs at risk to automation in the near term, including in scientific services and manufacturing.[35] Sustained focus is required to build and attract a skilled workforce, upskill the current workforce, and increase leadership and management capability. There is a need to increase enrolment in STEM subjects at school by making information available about the value and opportunities of these skills and identifying successful education to employment pathways.

3. Support for start-ups to commercialise – Local companies developing novel and high-value technologies often struggle to gain access to suitable physical locations with the right infrastructure within our region, and to high levels of capital needed to commercialise new products. High productivity countries such as Finland, Singapore and Sweden focus their innovation policy on growing innovation ecosystems around several large firms or sectors. We can learn from them and place a particular focus on creating an ecosystem to deliver globally-leading innovation support services, helping with the commercialisation of science, supporting Māori innovation, shifting to a high-value economy through new founders, and growing high-potential businesses.

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Photos: 1. Anna Briggs | 2. Capture Studios

Technology

A key focus of this plan is on the technology aspect of STEM because our region has a particular opportunity to create more jobs and improve residents' wellbeing by nurturing and supporting more businesses in this high-growth area. Technology is changing the way we work and companies that use technology to create products which scale are growing faster than ever. This represents both a threat and an opportunity for our region.

Twenty years ago, most local advertising dollars were spent on television, radio and print. Now, New Zealand businesses spend more than $2b in digital advertising annually.[36] Ten years ago, almost all tourists booked into local hotels. In the 12 months to February 2024 our region had almost one million room nights booked through Californian-owned website Airbnb.[37]

The internet has enabled smart companies to reach a global audience, disrupt local businesses and emerge as multi-billion-dollar "winners" in their category. Similarly, the global demand for solutions to climate and environmental challenges are an opportunity for those with high-tech intellectual property to generate enormous value.

Our region has a choice. We can ignore these opportunities in technology, watching our money and brightest talent flow overseas into the arms of foreign organisations. Or we can be a region that grows its own world-beating tech companies, retaining intellectual property, talent, and value in Wellington.

As a region we have proven our ability to compete with the rest of the world. Locally-founded accounting software company Xero is valued at $15.1b and employs more than 4,000 people globally.[38] Fin-tech startup Hnry raised $35m[39] to fuel its impressive growth of more than 600%. Our smaller companies are also acting on their global ambitions, with the likes of Storypark starting sales of its education software into Canada, and Goodnature now delivering Bluetooth-enabled smart-traps worldwide. Wellington is also home to a pipeline of promising cleantech and climate-tech companies, such as fusion energy startup OpenStar.

Despite these successes, competing with global mega-companies is difficult and our region's startup ecosystem is not as mature as in other countries, which have easier access to talent, investment, and leaders experienced in scaling global technology businesses. Government, businesses, and economic development organisations can play an important role in increasing accessibility of these key assets to fuel the number and growth of high-value startup companies. We can see the success of such interventions in cities such as Vancouver,[40] and Dublin[41] where Government-led initiatives are increasing the quantity and quality of new companies reaching global scale.

With support, a regional ecosystem can be established, become self-sustaining and enable productivity in other sectors. Employees of locally-headquartered companies will learn from their experience and become the next generation of technology entrepreneurs. The founders of Sharesies were themselves employees of Xero when they started their business. As investors in these breakout companies achieve high returns, they reinvest into the next group of companies. As a result, our region will thrive and be a leader of change in the decades to come.

Issues and opportunities

There are four key issues and opportunities to grow and maintain a sustainable and thriving technology sector.

1. Profile of innovation and quantity of entrepreneurs – To compete globally, we must harness the entrepreneurial talent of mana whenua and our wider community to ensure those with good ideas are motivated and supported to turn these ideas into businesses. This will involve lifting the profile of our successful founders, more exposure to entrepreneurship at school and in tertiary institutions, and providing greater visibility of Māori entrepreneurial success. It will also involve encouraging by Māori for Māori models of innovation and prosperity, better connections between research and commercialisation, and structured pathways and support for new technology businesses through arming our founders with important knowledge about capital structure, technical architecture, recruitment, leadership and wellbeing.

2. Skills shortages – We have a critical shortage of work-ready software developers, product leaders, user-experience designers and digital marketers. As more founders develop scalable businesses in our region, we must prioritise initiatives that train and prepare these workers, to capitalise on the potential of our region's talent and increase the number of people in high-value employment. There is an opportunity to support the untapped potential in our Māori and Pasifika communities to succeed in technology-related employment, by establishing tuakana/teina (mentor/mentee) relationships between those with experience in the sector and rangatahi who are new to it.

3. Leadership – High-growth companies and investors in our region have identified a lack of experience at a senior leadership team level that puts our businesses at a disadvantage to their international competitors. For example, a typical Head of Marketing, Chief Technology Officer or Chief Operations Officer at a scale-up company in San Francisco or Sydney would likely have experience working at a similar stage of business and easier access to mentors. Businesses need support to upskill executive talent at our high-potential companies, so each business can reach its full potential. Technology businesses have raised this as an issue because they can grow quickly and solutions to capability building should be transferable to other sectors with similar issues.

4. Investment – Our angel and venture capital investors are in early-stage development compared to other markets. Funds established in leading international technology markets have led to startups achieving multi-billion-dollar valuations, therefore enabling the funds to scale-up investment in new companies and attract foreign capital. To develop more business and accelerate developments the focus must be on supporting businesses with venture capital attraction and providing direct investment or loans where appropriate. We must focus our efforts and aim to become a magnet for talent and investment in particular sub-sectors where we have an advantage, including clean-tech, fin-tech and government innovation.

Our current focus is on initiatives to support STEM innovation, workforce and venture capital attraction.

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
	Foster STEM innovation and collaboration, raising the profile of the STEM sector					
	STEM product commercialisation innovation space Establish an innovation space pilot to guide, nurture and support STEM businesses from across our region to succeed, with an on-site workshop for prototyping and product creation, a wrap-around network of specialist providers and support programmes. This will support the creation of high-value jobs in successful start-up ventures, growth of existing companies and development of commercial opportunities related to the transition to a low emissions future	Develop a business case to establish a suitable facility with a fully equipped innovation space and wrap-around support services	Pro-Dev	Callaghan Innovation, MacDiarmid Institute, mana whenua, Hutt Valley Chamber of Commerce, UHCC, HCC, MBIE, WNZ	2022 – 2023	Complete
		Confirm commitment to establish the innovation space/s and secure a suitable complex (should it prove feasible)			2023 – 2026	Investment attraction
		Develop a parallel innovation programme for the space targeted at STEM-focused start-ups			2026 – 2027	Planning
	Taiawa – Wellington Tech Hub The hub will be in a high-profile location, connecting creative industries, start-ups, business, Government and innovation together in one place and driving cross-industry collaborations. The businesses located in the facility will be in high growth areas, leading to an increase in revenue and jobs	Develop a business case to establish a tech hub for scale-ups and start-ups in a high-profile location with a sustainable financial model	VUW and WCC	WNZ, local government, private investors	2022 – 2023	Complete
		Secure location and operating arrangements			2023 – 2024	Complete
		Establish the hub and expand to include a range of growing scale-ups and start-ups			2024 – 2026	Delivery
	Build and upskill our workforce					
	Summer of Tech Evolve the Summer of Tech programme to pilot a Summer of Engineering internship and placement programme, while continuing to meet the needs of the tech sector, helping to facilitate recruitment of students and graduates across our region	Pilot a Summer of Engineering programme in a selected area of engineering, matching 20 engineering graduates with employers	Summer of Tech	WNZ, businesses	2022 – 2024	Complete
		Continue Summer of Engineering as a workstream of Summer of Tech, and support the evolution of the programme to ensure our future tech workforce has the necessary skills and work experience for our future tech sector			2025 – 2026	Delivery
		Evolve the Summer of Tech programme to meet the needs of a changing tech sector, helping students and graduates accelerate their relevant skills and work readiness, and helping employers attract and retain talent			2025 – 2026	Delivery
	Hono: Ngāti Toa Rangatahi STEM pathways Deliver a programme to raise awareness of and interest in STEM subjects in local communities, aiming to increase representation of Māori in STEM tertiary education and careers	Pilot a programme for Māori university students studying STEM subjects to mentor year eight classes	Ngāti Toa	WNZ, education institutions and local community groups, AWATOA, House of Science, Matamoe Hub	2023	Complete
		Continue to build and develop STEM mentorship programmes, aligning with other local STEM related programmes			2024 – 2028	Delivery

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
		Build and upskill our workforce				
	Technology and innovation leadership series The training series will involve bringing local and international experts from companies including Netflix, Canva, Atlassian and Airbnb to our region to train and consult with leaders from our high-potential technology businesses. The series will be designed to upskill the senior leadership teams of our brightest companies, to ensure they have the best chance at becoming global leaders and major local employers	Run a series of training workshops to upskill senior leadership teams from high-potential technology businesses across our region	Creative HQ	Businesses, MOVAC, WNZ	2022 – 2027	Delivery
	Growing Wellington's start-up and scale-up ecosystem Growing Creative HQ's offerings to provide start-up and scale-up founders with support on their full journey from idea to growth, leading to more quality founders and ventures, an increase in jobs, and improved connectivity of the start-up eco-system in our region. The programmes will include strong female and Māori representation and actively build collaborations and partnerships with iwi	Develop and implement a 6-12 month business incubation programme to identify, support and grow 20 new start-up businesses per year	Creative HQ	WNZ, local government, mana whenua, Callaghan Innovation, private investors	2022 – 2023	Complete
		Secure funding to deliver scaled-up start-up programmes			2022 – 2027	Complete
		Introduce a robust pre-incubation programme to upskill and prepare founders not yet ready for incubation/acceleration, building a pipeline of companies to be founded			2022 – 2025	Complete
		Expand incubation and acceleration programmes, to increase the number of programmes run and founders supported per year, anchoring founders in our region to build growth businesses here			2022 – 2027	Delivery
		Secure funding to create a scale-up programme			2025 – 2026	Investment attraction
		Deliver a programme for Wellington based scale-ups			2026 – 2027	Delivery
		Deliver a series of activations that grow the start-up, scale-up and tech ecosystem			2025 – 2027	Delivery

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
	Build and upskill our workforce					
	STEM maker story A marketing initiative designed to deliver a consistent and compelling way of promoting our advanced manufacturing and innovation capabilities to the rest of Aotearoa and the world. Activating a compelling, authentic and consistent campaign will enhance our reputation as a source of world-class tech solutions. We can build awareness, pride, collaboration and attract tech talent by showing our local rangatahi their future and mahi they can be part of	Scope, define and enhance plans for a STEM marketing series made by young people for young people	Hutt City Council	Hutt Valley Chamber of Commerce, local STEM businesses including advanced manufacturing, WNZ	2023 – 2024	Planning
		Pilot the STEM maker story in the Hutt Valley			2025 – 2026	Delivery
		Evaluate the success of the pilot and explore expanding it to the wider region			2026 – 2027	Delivery
	Facilitate opportunities for venture capital attraction					
	Capital Capital To run a Capital Summit in Wellington bringing together our region's best tech business leaders and start-up founders with investors and fund managers. This event will connect our brightest companies with investors and likely lead to collaboration and funding. It will inform the investors who are based here including our venture and angel investment community to help them become more effective	Design programme and secure funding for a Capital Summit	Creative HQ	Angel HQ, other investors, WNZ	2023 – 2025	Planning
		Deliver a Capital Summit, enabling local tech company founders to build relationships with venture partners			2025	Delivery
		Review the success of the summit and explore next steps to attract more investment into high-growth companies in our region.			2025 – 2026	Delivery

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Photos: 1. Capture Studios | 2. Anna Briggs

SECTOR

Visitor economy

Famous for a vibrant, creative culture fuelled by great food, wine, craft beer, coffee and events, we are a cosmopolitan region with an energetic personality. The visitor (manaaki) economy is important because it is our responsibility to look after our manuhiri (visitors) and residents. Manaaki denotes 'mana' and 'a-ki' (mana comes from what others say about you and your ability to care for others). Our positive reputation as a destination is hard-earned and requires consistent, affirming experiences and a binding vision for all who contribute to how people experience Te Upoko o Te Ika a Maui.

The visitor economy generated more than $4.49b of GDP[42] for our region in 2023. Visitor spend exceeded pre-pandemic levels in 2023, at $2.5b, comprising $599m international spend and $1,901m domestic spend.[43] At a national level, tourism is back as our second largest export sector after dairy. Our international visitors are high-value, spending on average $232 per day, compared to $155 a day per domestic visitor or $74 a day per local resident.[44] There is an increasing value placed on tourism as indicated by a 2023 Tourism NZ survey of New Zealand residents, with 93% and 92%[45] respectively believing domestic and international tourism is good for New Zealand. Through spend from visitors beyond our region, tourism supports amenities that would otherwise not exist and provides employment opportunities across our region.

The visitor economy is built around experiences and attractions, hospitality, events, arts, retail and accommodation. Iconic experiences and events drive visitation to our region, while accommodation, restaurants and shopping are usually supporting factors.

Tourism businesses across our region have re-established since the pandemic, with existing businesses coming out of hibernation and new businesses opening despite a constrained lending and investment environment since Covid-19. A return to 2019/20 international visitor arrival levels is forecast for 2025/26, however domestic travel and the hospitality sector are being impacted by other macro-economic factors. Between 2022 and 2023 tourism jobs increased by 3% to of 52,777 employed in the tourism industry in our region.[46]

Domestic access to our region is good, with regular flights from all around the country and SH1 and SH2 providing paths around our region. We have commuter, intra and inter-regional train services and two Cook Strait passenger ferry companies. Wellington Airport is a vital hub in the domestic aviation network and connects to most New Zealand airports and several ports in Australia. Outside of Australia, Fiji and the currently hibernating Singapore Airlines service via Australia, our region has no direct international flights. Additional capacity from the United States has turned it into New Zealand's star performer post-Covid. Global aviation is forecast to double in the next 20 years and Qantas is now the largest Trans-Tasman carrier from Wellington. Given that 99% of New Zealand's visitors arrive by air, securing further direct international flights would make our region more accessible to visitors, highly-skilled migrants, international students, business connections and friends and family who live abroad.

Our region has a significant number of natural assets which connect visitors to the natural environment, including Kapiti Island, Zealandia Te Māra a Tāne, regional trails and cycleways, Wairarapa's Dark Sky Reserve, Cape Palliser and many more. Our visitors get to experience the many creatives, innovators, chefs and growers telling stories that give visitors a deeper appreciation of our hospitality, events and exhibitions.

Destination management[47] involves managing all aspects of a destination that contribute to a visitor's experience. The Wellington Regional Destination Management Plan builds on the five sub-regional Destination Management Plans of Wellington city, Hutt Valley, Kāpiti Coast, Porirua and Wairarapa. The Horowhenua sub-region also has a Destination Management Plan.

These Destination Management Plans are the primary vehicle for sector development at a local level and have been developed by canvassing the aspirations of communities, mana whenua, visitors and tourism businesses across our region.[48] Product development is a complementary and particular focus of this plan that will build on, and use, the business development capabilities within WellingtonNZ, as the regional economic development agency, and create regional alignment to focus our resources. Regional Tourism New Zealand's Project Tonui White Paper seeks to address ongoing national challenges around destination management and tourism system funding.

The three strategic priorities of the Wellington Regional Destination Management Plan are:

1. **Tangata – Valuing our people:** Our people are our greatest asset and we must value and empower them to achieve our community aspirations
2. **Whenua – Valuing our place:** Te Upoko o Te Ika a Maui is home to key natural taonga (treasure), and our visitor economy can't be developed at the expense of our natural assets. By rebuilding the balance and health of our natural environments, we contribute to the ongoing wellbeing of our people
3. **Kōrero – Valuing our stories:** Stories connect our people and places and bring them to life. Engaging stories within the natural environment grab visitors' attention and take them on a journey of discovery, helping to build critical and lasting connections between visitors, tourism operations and destinations.

Strong iwi partnerships are essential to enable informed decision-making, deliver positive impacts to communities and provide opportunities for locals and visitors to better connect with mana whenua. Across our region, some iwi initiatives are identified or underway already, while other relationships are emerging from the destination management process.

The destination management approach is to derive greater social, cultural, environmental and economic wellbeing for residents and visitors to our region. This is consistent with Tourism 2050, a blueprint from Tourism Industry Aotearoa setting out the industry's plan for its future and vision to enrich Aotearoa New Zealand through a flourishing tourism ecosystem.[49]

Issues and opportunities

There are six key issues and opportunities to grow and maintain a sustainable and thriving visitor economy.

1. Increasing spend and demand – Our region has a lack of paid tourism experiences and many attractions are free, like Te Papa and cycle trails. We must encourage high-value visitors that give back more than they take by developing and marketing iconic experiences for each sub-region and attracting events, shows and exhibitions year-round. This will provide more reasons to visit, and see the benefits shared with local communities across our region.

2. Partnering with iwi to share Māori stories that encapsulate their narratives and experiences – By showcasing our cultural identity and tikanga, manuhiri will experience Māori culture and build our global brand. Wairarapa's destination management plan and WellingtonNZ's own brand direction are examples of the meaningful engagement guiding destination marketing, regional storytelling and product development.

3. Improving access and lowering visitor emissions – For domestic and international visitors via road, rail, sea and air. Wellington has constrained international air capacity and growing this would generate more demand. Better wayfinding and the national Integrated Ticketing Solution would improve visitor access to our public and regional transport network. Major infrastructure investment will be needed to transition to green charging infrastructure for cruise and aviation. Cook Strait ferry resilience is of extreme importance to the sector - Wellington has already been negatively impacted by 2022 ferry disruptions with tour operators choosing to overfly the centre of the country instead. Climate change is starting to impact maintenance and access to regional trails and the Remutaka Cycle Trail (a Ngā Haerenga Great Ride), requiring a greater focus on building resilience into the trails. We can help the sector meet growing consumer expectations by supporting businesses to transition to low emissions and sustainable models via capability building programmes.

4. Leveraging new developments to increase accommodation supply – Accommodation demand is likely to increase in the medium term, especially with new developments like Tākina Wellington Convention and Exhibition Centre which can host up to 1,600 delegates, and Lane Street Studios, a new world-class film studio and production facility in Wallaceville that can cater for up to 500 cast and crew. By understanding current and future accommodation needs we can plan for future scenarios. The Wellington Accommodation Demand Report identified a hotel accommodation shortfall and outlined some of the reasons, including Wellington-specific issues relating to cost of building and insurance. To realise the full economic impact of developments such as Tākina and Lane Street Studios, hotel development remains a key opportunity.

5. Improving international visitor awareness of what our region has to offer compared to other New Zealand visitor destinations – Collaborative marketing efforts are underway to raise awareness and generate demand through the Regional Trails Framework, Classic New Zealand Wine Trail touring route, Ngā Haerenga New Zealand Cycle Trails, the Wellington Region & Wairarapa Marketing Alliance, public/private partnerships and leveraging Tourism New Zealand's domestic and international marketing programmes. We can increase awareness by leveraging Wellington's capital city status, unique biodiversity successes and highlighting our food and beverage sector to provide a deeper visitor experience and create stronger business benefits across our region.

6. Attracting and retaining talent – Securing a tourism and hospitality workforce remains a challenge. Sector pay has shown significant improvement in the last three years, but perception shift is still needed to position the visitor economy as an attractive career and clarity is required on Government priorities. We need to provide more opportunities to develop and grow our workforce, creating a regenerative visitor economy which attracts talent.

Our initiatives elevate regional priorities to improve sector performance through an integrated destination management and marketing approach which enhances the sustainability of tourism operators and develops iconic experiences in partnership with mana whenua.

Photos: 1. Jason Mann Photography | 2. Mark Tantrum | 3. Mark Tantrum
4. Capture Studios | 5. Mark Tantrum | 6. Caleb Smith Photography

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SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
	Support a transition to low carbon and sustainable visitor economy					
	Visitor economy sustainability programme Expand previous pilot tourism sustainability programmes to more tourism operators and hospitality businesses across our region, helping them become more sustainable, and measure and reduce their carbon emissions. In time, this will build into a unique selling proposition for our region as a destination	Confirm size, scope and costs of the capability building programme, considering the learnings from the sustainability pilots	Hospitality NZ	TIA, Restaurant Association NZ, WNZ, local government, Wellington Culinary Events Trust	2022 – 2023	Complete
		Deliver a capability building programme which supports visitor economy businesses on a journey to becoming carbon neutral			2023 – 2026	Delivery
		Share the success stories of each cohort and connect participants with previous cohorts for ongoing support and monitoring			2024 – 2026	Delivery
		Develop a complete suite of tools and programmes to help operators decarbonise, and incentives to encourage visitors to stay longer and travel more sustainably			2026 – 2027	Planning
	Improve the value and sustainability of tourism across our region through developing iconic attractions					
	Porirua Adventure Park Develop a world-class paid tourism attraction that will create jobs, celebrate the stories of Ngāti Toa, provide education/ Mātauranga opportunities, and regenerate the Rangituhi/ Colonial Knob reserve	Confirm support, business structure and secure the remaining capital required for establishment	Ngāti Toa and Select Contracts	Private investors, PCC, DOC, WNZ, MBIE	2022 – 2025	Investment attraction
		Finalise design documentation for building consents			2023 – 2025	Delivery
		Construct the buildings and infrastructure on site			2026 – 2028	Delivery
	Wairarapa Five Towns Trail Network Develop the Five Towns Trail Network as a signature experience to showcase our strengths, attract domestic and international visitors and enhance the wellbeing of our residents	Wairarapa councils to receive public input during the June 2024 long-term planning consultation period to establish community support to progress	Wairarapa Five Towns Trail Trust	Wairarapa Trails Action Group, Trust House, Rangitāne, Ngāti Kahungunu, WNZ, Waka Kotahi, CDC, SWDC, MDC, GWRC	2024	Complete
		Establish a delivery entity to manage the development of the trail network			2024	Complete
		Develop a multi-year phased implementation programme and secure investments			2025 – 2035	Investment attraction

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
Improve the value and sustainability of tourism across our region through developing iconic attractions						
	Wairarapa Dark Sky development A programme of activities to leverage the Dark Sky accreditation through existing tourism offerings, new iconic experiences and Māori tourism. This will contribute to a more diverse, year-round tourism offering that will attract new visitors and encourage existing visitors to extend their stay and spend	Announce result of International Dark Sky accreditation bid	Dark Sky Steering Group	Destination Wairarapa, Rangitāne, Ngāti Kahungunu, CDC, SWDC, MDC, Business Wairarapa, Wairarapa Dark Sky Reserve Association, WNZ, WEDS, MBIE, TPK, MCH, tourism operators, Milky-Way.Kiwi Ltd	2022	Complete
		Market and leverage existing events and offerings through collaborations, branding, promotion, developing a Dark Sky trail and calendar, and ensuring businesses can cater for Dark Sky through providing specialised capability support			2022 – 2026	Delivery
		Develop an implementation plan, progress the Dark Sky offering and identify and develop new experiences and attractions with a focus on Māori tourism, sustainability and regenerative activities, including considering support for a Wairarapa space science centre			2023 – 2026	Delivery
		Identify long-term funding options and investment for implementing iconic experiences and attractions			2024 – 2026	Investment attraction
	Footsteps of change Partner with businesses, iwi, national and government organisations to develop engaging, accessible visitor experiences based around Wellington's local and national institutions that tell stories which have shaped Aotearoa	Develop a prototype installation of the parliament precinct in the foyer of the National Library to inform a feasibility study	WellingtonNZ (interim lead)	Locales, WCC, MBIE, National Library of New Zealand, Archives New Zealand, Te Atiawa	2023 – 2024	Complete
		Develop and deliver phase one, the minimum viable product, based on the interactive map, mobile guide and information guide			2024 – 2025	Complete
		Expand the experience to include further precincts and stories of interest, including a waterfront trail of people and place as told by mana whenua			2025 – 2027	Delivery
	Pāuatahanui to Paekākāriki Trail Develop the Pāuatahanui to Paekākāriki Trail with qualities that both the local recreation and tourism market seeks. This will create a strategic link in our region's north-south multi-day trail network - attracting visitors, enhancing our reputation, and providing opportunities for ecological restoration and cultural storytelling	Confirm NZTA funding level and agreements for delivery of trail construction by NZTA and by Kapiti Coast Trails Trust	Kapiti Coast Trails Trust	NZTA, GWRC, KCDC, PCC, DOC, Ngāti Toa	2025 – 2026	Planning
		Establish land access agreements and partnerships required to develop the full trail experience			2026	Planning
		Raise the remainder of funding required for staged development			2026 – 2029	Investment attraction
		Construct the trail			2027 – 2029	Delivery

SECTOR

Primary sector, food and fibre

EMPLOYMENT

13,347

GDP

$2b

The food and fibre sector covers primary sector production, processing and services industries along the value chain from producer to final consumer, including support services such as transport, storage, distribution, marketing and sales.

Like the rest of New Zealand, the food and fibre sector is a key part of our regional economy, contributing $2b to regional GDP in 2023 and employing 13,347 people.[50] While food and fibre manufacturing is spread across the region, our sub-regions of the Kāpiti Coast, Horowhenua and Wairarapa play a particularly big part in our regional food and fibre story. They are responsible for just over 90% of the food and fibre production in our region.

Kāpiti Coast and Horowhenua have a strong focus on horticulture, livestock, poultry, and high-value food and fibre product manufacturing. The Wairarapa has a strong focus on meat, livestock, viticulture, dairy, forestry and related processing. Each of these focus areas has its own unique complexities, challenges and opportunities.

The WRLC is developing a Regional Food System Strategy to foster a sustainable, locally-based, and equitable food system, which will have linkages with this sector-based approach. Mana whenua support taking food diversification approaches that reflect the biodiversity of our region.

Events like Visa Wellington On a Plate and the Kāpiti Food Fair provide unique opportunities to showcase local produce and tell a story about the growers, artisan producers and restaurants in our region. Similarly, in Horowhenua, the Taste Trail showcases local producers, giving tourists a unique opportunity to visit producers who provide much of the fruit and vegetables for the central and lower North Island.

Wairarapa

Food and fibre contributed $600m to GDP in 2023[51] and employed 4,600 people in the Wairarapa sub-region. This sector, and the variety of businesses that support it, is a major source of income and employment for Wairarapa. Wairarapa is a diverse area stretching from the valley plains through to the forested back-country and rugged coastlines. It provides opportunities for wholesale exporters, manufacturers and local artisan producers alike. These intersecting business identities and landscapes create a culture rich in diversity, innovation, and potential for the Wairarapa brand.

Mana whenua have had a constant presence since first occupation of Wairarapa, from early settlement of the coastline through to modern-day operation of commercial farming and forestry enterprises. Local iwi Ngāti Kahungunu and Rāngitane o Wairarapa are concluding historic Tiriti o Waitangi settlements and local investment is likely to align with sustainable land management and the principles of kaitiakitanga. This will see a greater focus on sustainable and renewable farming practices, investment in skills and education, and exploring alternative land use strategies.

Kāpiti Coast and Horowhenua

Food and fibre contributed $370m to GDP in 2023 and accounted for 3,408[52] people in employment in the Kāpiti Coast and Horowhenua sub-regions. There is a rich history of food production from supplying many generations of iwi and hapū off the fertile soils and microclimates from Taitoko to Te Horo, to the myriads of artisan businesses now producing and serving consumers across New Zealand with jams, craft beer, chocolates, artisan breads,

pesto, hemp products, hot sauces, roasted coffee, gin and vodka. From Paekākāriki to Levin, these artisans have chosen to live on the coast and share their expertise and experiences through the food products they produce and distribute. There is also an increasing number of in-house customer experience opportunities.

Aspirations of mana whenua are connected to the land, water, and all it produces, with increasing focus on regenerative horticulture opportunities. It will become increasingly important to protect our productive lands for current and future generations as our population grows. We need to nurture our food producers as food sustainability and accessibility become even more important with inflationary pressures, access to and affordability of workforce, kaitiakitanga, land-use optimisation and water quality.

Issues and opportunities

The last two years have been a period of significant volatility and change for the sector. Market dynamics, reduced consumer spending capacity, additional regulatory requirements, high inflation impacting interest rates and input costs, and opportunities for a change in land use have all played a part.

New Zealand productivity levels are declining, especially in the food and fibre sector. Large firms tend to be more productive than small firms. However, our region has a small number of large food and fibre firms, and only a few are engaged internationally. Lack of technology uptake and digitalisation is also a factor in low sector productivity levels. Limited access to sector-specific shared facilities and capital investment makes it difficult for businesses to scale up and develop more efficient processes.

Sheep numbers have been in steep decline since the 1980s.[53] Wool income is less than shearing costs,[54] which has further impacted sheep farming, and an aging owner/operator workforce adds another level of challenge. Beef and dairy numbers have remained static over the same period.

Our food and fibre sector typically has low levels of capital investment and intangible or knowledge-based capital, including management and governance skills. Regional manufacturing enterprises have indicated they buck these trends with recent investments in these areas. The sector has high levels of self-employment at 20.4%, higher than the regional self-employment average of 14.8%.[55]

Our region has lost more farming land than any other region in New Zealand - almost 30,000 hectares in the last 10 years.[56] Our food and fibre sector therefore needs to look for regenerative opportunities to increase productivity or value add and investigate how to incorporate innovation and diversification into its production systems, to retain GDP contribution over time.

The four issues and opportunities outlined below have been identified as next steps for the sector.

1. Increase food and fibre sector productivity – Understanding how the sector contributes to the regional economy, what our levers are to lift productivity, and how we measure success against the levers at regional level is a good first step to raising awareness of its economic impact and making steps to improve it. There is potential to improve sector wellbeing by tackling this opportunity, finding options to add value through partnerships, provenance and branding, preventing working harder as the only way to increase production.

2. Innovation and diversification – There is an opportunity for the sector to consider innovation and diversification and how it can grow businesses. Producers should be encouraged to fully explore diversification opportunities open to them, including alternative land uses, production systems, and tourism. Collaboration between producers and other stakeholders within the sector would help to ensure supply chain and market development from diversification activities and make use of our regional advantages, including through the visitor economy. Maintaining resilient transport connections and removing barriers to accessing infrastructure and investment is important to enable this.

3. Resilience – The sector is facing significant changes due to macro-environmental forces, including political, economic, social, technological, environment and legal/regulatory. Consumer preferences and spending power have also been altered by the economic downturn. These changes have resulted in deteriorating profitability and confidence for the sector, which is likely to have a particularly strong impact on our many producers focused on non-essential goods.

Our region is likely to warm significantly due to the impacts of climate change. Access to reliable water for production is essential, but also a risk as rainfall may decrease in Wairarapa and increase in the Kāpiti Coast and Horowhenua.[57] Extreme weather events are also likely to become more common.

4. Sector skills development and shortages – Access to a skilled workforce is crucial but can be challenging, especially where roles are seasonal, require shift work, and/or rely on overseas workers. The sector is constrained by a perception of a lack of skilled jobs, as well as a shortage of access to effective on-the-job skill development opportunities.

Another key consideration to achieving a productive, future-focused, customer-orientated, resilient food and fibre sector, is the vision and leadership skills required at all levels, including industry and governance. These skills are required to create and sustain food and fibre value chains that return viable and consistent returns to our region's producers.

We are focused on initiatives which support innovation and collaboration across our regional food and fibre sector.

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
	Identify and develop innovative and sustainable new food and fibre opportunities across our region					
	Kāpiti – Horowhenua kai connect This programme aims to raise the profile and quality of the sector, facilitate partnerships, retain, grow, and continue to attract businesses of all sizes and types across the value chain, create high-value jobs, train the workforce, progress the foodie vibe and strengthen overall sustainability positioning and activity The programme will explore more sustainable ways to grow and distribute food, including future-proofing manufacturing and packaging technologies for energy efficiency, waste minimisation, carbon footprint and establishing circular economies	Develop an over-arching food and beverage strategy	EDKB	KCDC, WNZ, MPI, MBIE, Kānoa	2022 – 2023	Complete
		Procure a facilitator to establish a cluster of Kāpiti Coast and Horowhenua food and beverage businesses, enhancing innovation, collaboration and knowledge sharing to support our regional, national and global competitiveness	EDKB	KCDC, HDC, THCL, WNZ, MPI, MBIE, Kānoa, iwi/hapū/Māori landowners, growers, retail stores and researchers	2022 – 2023	Complete
		Establish partnerships, business and governance models to pilot a regenerative horticulture production programme with iwi and hapū, to sustainably produce fresh vegetable varieties. This will involve mātauranga Māori and kaitiakitanga along with other proven regenerative farming methods	EDKB and Ngā Hapū o Ōtaki	KCDC, HDC, THCL, WNZ, MPI, MBIE, Kānoa, mana whenua	2022 – 2029	Investment attraction
		Develop a special purpose vehicle to attract co-investment and establish a scalable shared food production facility or precinct	EDKB	KCDC, WNZ	2024 – 2025	Business case
		Implement the Kāpiti Coast Food and Beverage game plan, including facilitation of the cluster, producers' guides, and access to distribution channels	EDKB	KCDC, HDC, THCL, WNZ	2024 – 2026	Delivery
		Collaborate on food and beverage initiatives across Porirua, Kāpiti Coast and Horowhenua, including developing a shared events calendar and connecting businesses	EDKB and THCL	KCDC, HDC, PCC, WNZ	2024 – 2026	Delivery

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
Identify and develop innovative and sustainable new food and fibre opportunities across our region						
	Food and fibre priorities in Wairarapa Identify opportunities to grow jobs, value and connections in the food and fibre sector in Wairarapa, contributing to our regional food story while considering climate change impacts	Collaborate with the Wairarapa community and food and fibre sector to identify priorities to address issues and opportunities recognised	WEDS	Wairarapa food and fibre sector and community	2023 – 2024	Complete
		Increase productivity and resilience in Wairarapa's food and fibre sector by equipping businesses with the knowledge, skills, and support needed to drive efficiency, innovation, and sustainability			2025 – 2027	Delivery
		Strengthen the resilience and growth potential of Wairarapa's food and fibre sector by supporting diversification, fostering innovation, and enhancing market access			2025 – 2027	Delivery
		Develop a strong, shared narrative for the sector that fosters collaboration, enhances regional awareness, and elevates the profile of local businesses			2025 – 2027	Scoping
		Strengthen workforce capability and resilience in the food and fibre sector by aligning training and development initiatives with the Wairarapa Skills & Workforce Action Plan			2025 – 2027	Planning
Māori-led assessment of options for land use						
	Ōtaki Porirua Trusts Board land use assessment Develop sustainable land use options to support the transition from a former dairy operation within urban Ōtaki, to benefit the iwi and community through new employment, improved wellbeing and providing education scholarships	Complete a feasibility study, land use assessment and environmental plan	Ōtaki & Porirua Trusts Board	J R McKenzie Trust, Ngāti Raukawa, Te Āti Awa, Ngāti Toa Rangatira, MPI, TPK, EDKB	2022 – 2024	Feasibility
		Develop a business case to implement recommendations			2022 – 2024	Business case
		Determine investment options to implement change over the next 5-10 years to a more sustainable model (should it prove feasible)			2024 – 2029	Investment attraction
		Advocate to central government to simplify the process for development of the land between partners			2024 – 2026	Advocacy

Photos: 1. Ryan Domenico | 2. Anna Briggs | 3. Jenny Siaosi

ENABLER

Māori economic development

"Tino rangatiratanga is not just a right — it is a responsibility to create, to lead, and to act in the interests of our people."

– Professor Whatarangi Winiata, Ngāti Pareraukawa, Ngāti Raukawa ki te Tonga.

The Te Matarau a Māui vision for Māori economic development is grounded in tino rangatiratanga and collective responsibility. As Professor Whatarangi Winiata reminds us, the power to lead must be matched with the will to serve and uplift our people. Te Matarau a Māui embodies this kaupapa — a regional platform designed to catalyse Māori enterprise, amplify Māori voices, and enable systems that support Māori economic and social aspirations. This refreshed chapter reflects our enduring commitment to kaupapa tuku iho, intergenerational prosperity, and building an economy where Māori potential is realised for the benefit of all.

Te Ūpoko o Te Ika is a region shaped by the whakapapa of its people and landscapes. The enduring presence of mana whenua and the strength of mātāwaka form a vital foundation for a thriving and resilient regional economy. Te Matarau a Māui – the regional Māori economic development collective – exists to weave together iwi, hapū, Māori businesses and mātāwaka communities to pursue intergenerational prosperity, economic rangatiratanga and collective wellbeing.

Issues and opportunities

Māori make up over 15% of the region's population, are kaitiaki of significant natural and cultural resources, and are leading enterprise and innovation across key sectors including technology, food and fibre, infrastructure, and tourism. But inequities persist – in income, access to capital, education pathways and asset ownership. Closing these gaps and unlocking Māori potential is not only a Treaty imperative – it is an economic one.

The region cannot thrive unless Māori thrive.

Our Te Ao Māori Lens

Māori economic development is not only about profit. It is about balance, whakapapa, and whanaungatanga. Te Ao Māori affirms that people, whenua and enterprise are interconnected. Through this lens, Māori are:

- Producers (kaihanga): revitalising food systems, papakāinga, energy sovereignty and whenua use.
- Innovators (kaiwhakatere): developing Māori tech, intellectual property, and digital enterprise.
- Investors (kaipupuri): managing intergenerational assets and creating new pathways for capital.
- Connectors (kaituitui): advancing kaupapa tuku iho that link social, cultural and economic aspirations.

Strategic Pou of Te Matarau a Māui

1. **Whai Rawa – Economic Development and Intergenerational Prosperity**
   Strengthening Māori participation in the regional economy through enterprise growth, Māori procurement, commercial partnerships, and intergenerational asset development. Whai Rawa includes support for rangatahi and whānau entrepreneurs, land development, and Māori-led investment.
2. **Whai Pūkenga – Skills, Talent and Workforce Pathways**
   Enhancing Māori capability through education, skills development, and workforce strategies. This pou ensures Māori are equipped for future industries, supported by kaupapa Māori education and vocational pathways that uphold cultural identity and excellence.

3. **Whai Kaha Hapori – Community and Whānau Wellbeing**
   Building thriving, resilient Māori communities with strong whānau foundations. This includes support for hauora, housing, kai sovereignty, digital inclusion, and innovation that uplifts community aspirations and wellbeing.
4. **Whai Mana – Leadership, Governance and Influence**
   Upholding Māori leadership and tino rangatiratanga across regional systems. Whai Mana ensures Māori are at the decision-making table, resourced to lead, and supported to influence policy, governance and investment across the region.

Strategic Partnerships

Trusted relationships with iwi, Māori networks, urban Māori, and institutions are central to how Te Matarau a Māui deliver impact.

Te Matarau a Māui works in close partnership with Māori and non-Māori organisations across the region to activate kaupapa Māori economic development. These partnerships enable a connected, community-led, and regionally aligned system of delivery that reflects the diversity and strength of our Māori communities.

These relationships are foundational to our shared success, ensuring Māori voices, leadership and aspirations are embedded across every part of the regional economic development system.

As a trusted regional intermediary, Te Matarau a Māui plays a vital role as a facilitator of opportunity for Māori businesses and communities. This includes acting as a connector between Māori and central government, local authorities, regional investors, and the wider business ecosystem. By building bridges, brokering partnerships, and supporting kaupapa-aligned initiatives, Te Matarau enables the conditions for Māori-led innovation, enterprise, and intergenerational prosperity to flourish.

This role is fundamental to leadership in regional procurement efforts, where Te Matarau a Māui work alongside Amotai and a range of corporate and government purchasers to increase Māori participation in public and private sector supply chains. By fostering these relationships, Te Matarau helps create a procurement ecosystem that values whakapapa, delivers social and economic outcomes, and strengthens regional equity.

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
		Regional economic development collaborations by and for Māori				
	Celebrate Māori businesses and entrepreneurs Tipu Pakihi brings together brings together pakihi Māori, investors, policy makers and business leaders to celebrate Māori enterprise, share insights, and grow regional opportunities through kaupapa Māori innovation and partnership	Secure funding for a two-day summit that will provide better understanding of the Māori economy in our region and help identify how to plan and implement impactful economic, educational and developmental programmes	Te Matarau a Māui	Four Māori Business Networks, Te Hapori Matahiko, Poutama Trust and sponsors	2022	Complete
		Hold a two-day Māori economic development hui for and by Wellington Māori to drive Māori economic activity in our region			2023	Complete
		Secure funding for and host a significant annual Māori business event to strengthen connections across the Māori economy			2024 – 2026	Delivery

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
Regional economic development collaborations by and for Māori						
	Māori business-needs assessment Support Te Hīhiri, a regionally connected Māori innovation ecosystem that nurtures enterprise, creativity and collaboration through a series of innovative programmes and initiatives, supported by a network of kaupapa Māori hubs which provide a place for Māori businesses to connect, learn, grow and thrive	Develop a pathway to identify the needs of Māori businesses and match them with the required services	Te Matarau a Māui and WNZ	Maori business networks, mana whenua, Pacific Business Trust, Te Amokura, local government	2022 – 2026	Delivery
		Deliver targeted support, tools and resources for Māori businesses based on needs identified, including Ngā Paoa o te Hinengaro - a high-energy, one-day Māori innovation sprint, and Te Aha Pakihi, the Māori business mentoring platform that connects aspiring Māori professionals and entrepreneurs with experienced Māori mentors			2022 – 2026	Delivery
		Co-design and support the creation of Te Ao Māori business hubs with participants in the Māori business ecosystem and stakeholders			2025 – 2026	Delivery
Strengthen procurement readiness across Te Upoko o te Ika a Māui through partnership and collaboration						
	Greater access to procurement contracts A commitment to use procurement as a tool for building social and economic prosperity was signed by several councils across the region in 2021. Increasing the number of entities signed up will increase spending with diverse local suppliers, generate new employment, help to build local business capability, create a more agile and resilient supply chain, and grow our regional economy	Advocate to expand the number of public sector entities signed up to the Te Upoko o Te Ika a Māui Social Procurement Commitment, to grow employment among local Māori, Pasifika and social enterprises and increase the amount spent with social providers year on year	Te Matarau a Māui and WNZ	Central and local government, mana whenua, industry	2022 – 2026	Complete
		Continue advocacy to align operational and policy settings for contracting through Te Upoko o Te Ika a Māui Social Procurement Commitment and beyond			2024 – 2026	Complete
		Increase Māori business participation in public and private sector supply chains by brokering opportunities, building capability, and working alongside partners like Amotai to create a more inclusive and whakapapa-informed procurement ecosystem			2025 – 2026	Delivery
		Finalise Project Uaki progressive procurement report, identifying key actions and a strategic framework to support greater access to contracts			2024 – 2025	Complete
		Deliver a procurement focused, Regional Business Partners Network funded, capability series to enable better procurement readiness, referencing the strategic framework highlighted in Project Uaki			2025 – 2026	Delivery

ENABLER

Skills, talent and education

He aha te mea nui o te ao? Māku e kī atu, he tangata, he tangata, he tangata

What is the most important thing in the world? It is the people, the people, the people

For our region to thrive and grow we need people with skills to live and work here, people to grow the businesses that provide decent jobs enabling good quality of life, and people equipped with the knowledge needed to address issues that will affect the future of our region, including climate change and sustainable practices.

Our labour force participation rate (the proportion of working-age people 15 years and over who are either employed or actively looking for work) of 76% for the year to September 2023 was above the New Zealand average of 72%. Our regional unemployment rate of 3.1% for the year to September 2023 was below the New Zealand average of 3.5%.

Skills, talent, and education are key enablers of regional economic development and productivity.[59] Together they play a role in ensuring our people can successfully work here, and employers can access the workforce they need now and for the future, especially when projections indicate there need to be 100,000 more jobs in our region over the next 30 years.

Having decent job opportunities locally is important to maintaining a sense of community and family ties, particularly for Māori and Pasifika. Enabling quality education and training for our rangatahi and access to decent jobs locally is therefore imperative for a more equitable workforce.

Our regional workforce has three notable characteristics:

1. Our workforce is skilled. Our region has a high level of educational attainment and training participation, and a good base of tertiary education, knowledge and skills. The percentage of employees classified as highly skilled or skilled in our region is 57.1% compared to 51.6% nationally.[60] This is mainly due to the presence of central government, a strong professional services sector and the largest research, science and innovation workforce in the country.
2. There are large disparities across local territorial areas and ethnic groups, in terms of educational attainment, unemployment and participation.
3. Systemic skills shortages are a regional issue for all our focus areas.

Particular attention and resource are required to achieve more inclusive and equitable workforce participation in key focus areas.

Since the launch of the REDP and the Wellington Regional Workforce Plan (developed by the former Regional Skills Leadership Group), we have worked to identify and deliver on initiatives of common relevance. As a result, a Regional Workforce Practitioners Group has been established to share information and to promote collaborative projects across sub-regional boundaries.

Issues and opportunities

There are two key areas that need to be addressed to build solid foundations for skills, talent and education.

1. Skills shortages – Skilled people are in high demand in our region, nationally and globally. Skills shortages were exacerbated by Covid-19 and are currently less at the forefront of the regional conversation due to a slowdown in recruitment. However, the issue has not been resolved and is only dormant - the shortage of skilled people is systemic and will continue to hinder economic development. In fact, it may have gotten worse with the accelerated rate of departure of New Zealand citizens and established migrants offshore, which may not be balanced in terms of skills and experience by rising immigration numbers. In the longer term, the shortage of skills will be persistent and exacerbated by an ageing workforce and declining birth rate.

Greater effort is needed to retain our workforce, requiring the Government and business to actively create that environment and work together to develop strategies to overcome issues. In recent years, employers have made significant efforts to provide flexible working conditions, pathways, upskilling opportunities, professional development and support to attain qualifications to attract and retain a skilled workforce. More recently, a risk has emerged that these practices will be hindered as employers see their post-Covid growth slow down. This will disproportionally affect people looking to join the workforce, in particular our young people, and people in employment looking to develop their career. In the longer term, employers will require skills that need to be nurtured and developed now, for the future.

Every focus sector in our plan is susceptible to a shortage of skills, as well as others like construction, health and education. These are all important to the development of our region and the implementation of the Future Development Strategy to support our growing population.

2. Education – While the immediate skills shortages are concerning, we have an opportunity to look ahead at education to grow talent. We know the workforce of the future will be more technology-based and combined with increasing automation, there will be more jobs in skilled and highly-skilled work. For our region to thrive and prosper we need high levels of participation and skills across all the priority sectors of our regional economy, all of which are facing growing demand for skills.

Vocational awareness and education that offers alternative pathways for students and leads to meaningful and rewarding work across sectors in trades and service industries is of equal importance. Employers are working with relevant government entities, including Workforce Development Councils, to influence development of “earn and learn” training and pathways that work for their sector.

Young people’s career aspirations form at a young age and can be predictive of later study and employment-related choices.[61] This reinforces the need for early exposure, particularly to less visible work and career opportunities.

Additionally, early intervention needs to address equity. There is a major mismatch between education and skills versus those required by employers in our region, particularly for Māori. A smaller proportion of Māori are in high-skilled jobs, 31.9% relative to 42.8% as an average of all ethnicities, and more are in labouring, machinery operation and sales jobs.[7] Pasifika face similar challenges, with 25.9% recognised as highly-skilled.

Sustained effort is required to build the skills and workforce needed to support our key sectors. We need to develop local talent to grow our own people, particularly Māori and Pasifika, mitigate against the risks of reliance on skilled migrants and support the building of thriving communities. This will be in parallel with attracting skilled talent needed by employers from offshore, particularly in specialist areas in the short and medium terms.

To enable our key sectors to thrive, build solid foundations and achieve more inclusive and equitable workforce participation, our skills, talent and education efforts focus on the following initiatives. These are complementary to sector-specific skills initiatives spread across this plan, such as the Summer of Tech, Technology and Innovation Leadership Training Series and Screen Accelerator Project.

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
	Future-proofing the skills of our people and the needs of our sectors					
	Expanded House of Science programme Expand the design and development of bilingual science resource kits so all primary and intermediate schools and their students have consistent access to a foundational education in science. This programme was created to address the lack of effective science programmes in primary and intermediate schools and is a long-term investment in developing our future science and technology workforce	Secure funding to resource wider implementation of the House of Science programme across the region	House of Science NZ Charitable Trust	WNZ, mana whenua, local government, schools, businesses, crown research institutes, MBIE, MOE	2022 – 2026	Investment attraction
	Tūhura Tech Tūhura Tech aims to grow the next generations of technologists by providing free technology education to youth and upskilling educators. Tūhura Tech believe that every child should have the opportunity to learn about and engage with technology, regardless of their background or financial situation, and are working to develop and grow upcoming generations of highly-skilled, job-ready technologists and innovators with critical and creative thinking	Secure sustainable funding to recruit and train additional coaches	Tūhura Tech	Kiwibots, Bastion Security, Ngāti Toa, Layer 9 Security, TEAM Naenae, Tawa Technology Education Trust, Te Mana O Kupe	2024 – 2026	Investment attraction
		Scale Tūhura Tech to more schools, libraries, and community centres across our region – offering a range of tech programmes, public talks and workshops, resources, teacher training, and support for competitive STEM teams			2024 – 2026	Delivery
	Girls who Grow This programme is focused on engaging our next generation of female change makers, leaders and environmental guardians into climate positive agriculture. Through facilitated educational activities in schools, educational hubs and on farm, students are able to spark their imaginations and get creative about a thriving future that they want to be a part of and curate meaningful and values aligned career pathways that support this	Deliver the Girls who Grow programme across the Wellington region, expanding on the pilot undertaken in Otago in 2023	Girls who Grow	Future Farmers NZ, Young Enterprise Scheme, MOE, MPI, WNZ, Lake Hawea Station, One NZ, Otago University, Lincoln University NZ	2024	Delivery
		Evaluate success of the 2024 programme and secure funding to resource continuing to deliver the programme across the region			2025 – 2026	Investment attraction
	Address regional and ethnic disparities in education and employment opportunities					
	Wairarapa skills programme Skill Wairarapa brings together education and industry groups to develop, maintain, and deliver a programme of work targeting skills and workforce development in the Wairarapa. The programme consists of sector-led projects with the potential to develop, retain, or attract the workforce that the Wairarapa needs, and create local employment opportunities, particularly for young people	Strengthen Wairarapa's workforce by implementing the Wairarapa Skills & Workforce Action Plan, ensuring local businesses have access to skilled talent and our people have clear pathways into sustainable employment	Skill Wairarapa	UCOL and other local education/training providers, high schools, local sector/industries, WEDS, MBIE	2023 – 2027	Delivery

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
	Address regional and ethnic disparities in education and employment opportunities					
	Kāpiti Coast Skills and Education Hub The hub will enable residents to access training opportunities in the areas they reside in and have ties to, benefitting their wellbeing and removing location-based barriers to meeting requirements for higher-skilled roles. This will support and encourage businesses to establish in the sub-region and grow their productivity through the availability of high-skilled employees, providing greater employment and career opportunities for workers including Māori, young people, people with disabilities and older people	Complete a feasibility study for local learning hub(s) to improve access to vocational and tertiary training	EDKB	KCDC, Ngāti Toa, Te Ati Awa, Ngā Hapū o Ōtaki, Te Wānanga o Raukawa, Horowhenua Learning Centre, Te Puna Oranga, Te Rōpū Pakihi, Work Ready Kāpiti and local high schools, UCOL	2022	Complete
		Secure funding to deliver the education and training hub(s), based on recommendations from the feasibility study and needs assessment (should it prove feasible)			2023 – 2024	Investment attraction
		Implement the establishment of first hub and associated learning programmes with industry, community partners and education providers			2024 – 2025	Delivery
		Support partners involved in employability pathways			2024 – 2026	Delivery
	Full STEAMM programme The Full-STEAMM extracurricular programme supports schools to transform female students from year nine onwards into future talent to drive productivity and strengthen equitable representation across STEAMM fields in New Zealand. Through eight years of dedicated mentorship, real-world experience, whānau engagement and industry pathways, the programme empowers Personal STEAMM (skills, talent, experience, attitude, mindset, motivation), and unlocks Career STEAMM success in science, technology, engineering, arts, mathematics, and manufacturing. It's Full-STEAMM ahead!	Pilot the E2E business model by developing a Wellington city E2E Centre and STEAMM programme	Wellington E2E Centre	Focus Futures, WNZ, commercial investors, business, MSD, MOE	2022 – 2024	Complete
		Continue to develop the E2E Centre's offering and secure sustainable funding to deliver programmes			2024 – 2027	Investment attraction
		Expand the E2E Centre to the wider region			2025 – 2027	Planning
	Pasifika business enablement Our region's Pasifika business sector is young and growing. With the recent development of new networks and providers, there is an opportunity to enhance connections and cohesiveness through building relationships and identifying opportunities to support Pasifika businesses to grow capacity and capability	Create and maintain an online hub to raise awareness of funding, advice and support opportunities for Pasifika businesses	WNZ	Wellington Pasifika Business Network, tertiary institutions, Pasifika students associations, Pacific Business Trust	2023 – 2024	Complete
		Connect tertiary students with the Pasifika business space through a speaker series featuring leaders from local Pasifika businesses and organisations			2023 – 2026	Delivery
		Develop partnerships to collectively support Pasifika interested in starting or growing a business with expanding their capacity and capability			2024 – 2026	Planning

Photos: 1. Grace Gemuhluogu | 2. Capture Studios

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ENABLER

Water accessibility and security

Ko te wai oranga o ngā mea katoa

Water is the life giver of all things

"Water is the blood of the earth mother Papatūānuku and the rivers are her veins. It is her who has given us life from time immemorial and it is with her that solutions to climate change lie."

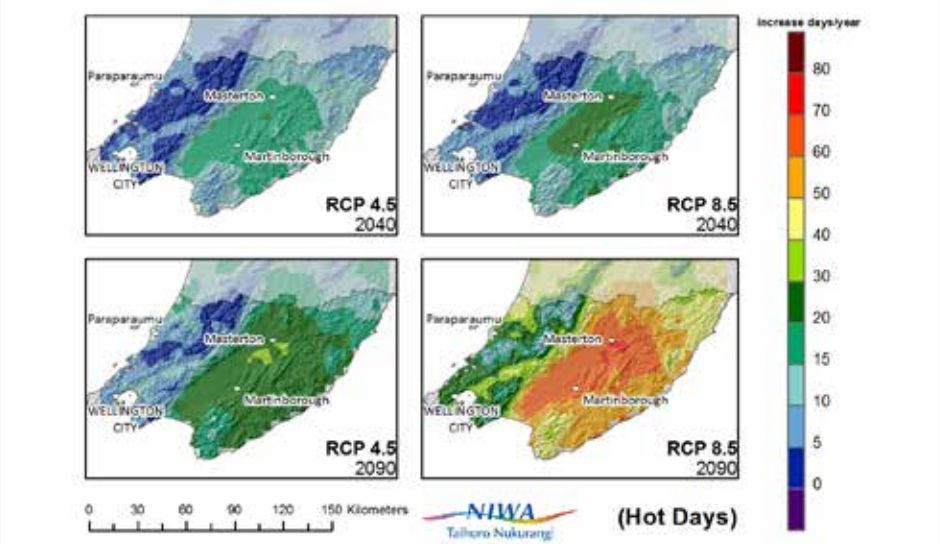
From the joint statement by Ngāti Kahungunu ki Wairarapa Tāmaki nui-a-Rua Settlement Trust and Rangitāne Tū Mai Rā Trust, from the Wairarapa Water Resilience Strategy (2021)

Water is critical to our lives, our wellbeing, and our potential. Our water system needs to be carefully balanced now while we have the time to protect, safeguard and enhance our natural environment, while developing resilient water sources, education, recreation and businesses.

Water accessibility and security are key issues for the region, and particularly for Wairarapa

Climate change studies[62] forecast that our region will experience increased variability and extremes of weather conditions, to the extent that water reliability and security will become critical in some areas. While the western side of our region is projected to be slightly wetter, Wairarapa is expected to be much drier and warmer, creating significant challenges to our economy and urban development. As such, Wairarapa is the focus of the water accessibility and security chapter.

The maps below depict the projected increase in hot days across our region for two climate change scenarios (referred to as Representative Concentration Pathways or RCPs). Emissions in RCP 4.5 (on left) assume emissions peak around 2040 and then decline. However, we are now trending close to RCP 8.5 (on the right) based on business-as-usual high emissions. This means that by 2040 inland Wairarapa may experience up to 30 more hot days (with a maximum temperature higher than 25°C) a year and by 2090 most of Wairarapa may have up to 70 more hot days a year. This is a significant increase given Wairarapa currently has about 24 hot days per year.



The impact of climate change, coupled with the need to ease pressures on the natural environment means that access to reliable water (run-of-river and aquifers) will diminish in many areas, especially in Wairarapa, at critical times of the year.

Water is delivered to urban and rural businesses across our region through municipal supplies, direct extraction from surface waterbodies or groundwater, all of which add pressure on water sources. Water sources can run dry or be deprived of naturally occurring elements resulting in the need to resort to back-up sources. For example, when river levels are low on the Kāpiti Coast, a river recharge scheme takes water from Waikanae River and tops it up with groundwater below the treatment plant.

Reliable water means security for businesses to operate, to guarantee quality and quantity of production, and confidence to invest in business growth. In addition to the challenges in Wairarapa, there are also significant challenges providing enough water to businesses and residents in the Wellington metropolitan area, including Upper Hutt, Lower Hutt, Porirua and Wellington city. High levels of water loss and ongoing growth means the minimum level of drought resilience can no longer be provided. Planned changes to environmental regulations to achieve Te Mana o te Wai, further growth and the longer-term impacts of climate change will add to the challenge.

Restoring the network to a sustainable level of drought resilience and maintaining this over time will require significant investment in reducing water loss, improving efficiency through metering and building additional storage lakes to meet future deficits. Funding the level of investment required to provide sustainable water services is proving a significant challenge for councils and is currently under review in response to the Government's evolving direction.

There is a need to continue implementing demand management across our region to build resilience and support the development of new businesses and industry. Together with fixing leaks and building more water storage, Wellington Water is advocating for the introduction of residential water metering as a key method to detect leaks and temper demand for water.[63] Residential water metering is already in place on the Kāpiti Coast, which has resulted in water consumption reducing by 26%. Water meters are also in place in South Wairarapa, Carterton and parts of Masterton districts. All commercial premises in the metropolitan Wellington area are metered.

Issues and opportunities in Wairarapa

Rural and urban Wairarapa communities will be severely impacted by the effects of climate change and are already facing an unreliable water supply, accessibility, and security issues. The Wairarapa needs appropriate infrastructure, effective environmental management and integrated regulatory settings so it can build water resilience and take advantage of economic development opportunities, especially in agriculture and tourism.

Key business sectors in the Wairarapa economy include accommodation and hospitality, primary industries, food and fibre and manufacturing - all are heavily reliant on access to a good, secure water supply. The collective impacts of climate change, limited potable water storage and tighter rules and regulations for water management are already impacting established business, inhibiting new business development and constraining population growth in the Wairarapa. In particular, lack of secure access to water is testing the viability of some existing primary processors, limiting future industrial land development and is increasingly identified as a barrier to investment.

This challenge has been building for some years now. In 2018, two inter-connected documents captured the challenge of managing water in the Wairarapa:

- The Ruamāhanga Whaitua Implementation Programme focused on the complex, inter-connecting factors that have damaged water quality in the catchment
- The Wairarapa Water Resilience Strategy (refreshed in 2021) recognises "an optimum and integrated view of water is required" when referring to water use in Wairarapa.

Acknowledging the need, while capturing the opportunity to act, the 2021 Wairarapa Water Resilience Strategy (WWRS) reflects a broad consensus about what needs to be done and how to go about it. The Wairarapa has a narrow window of opportunity to adapt to the threat of climate change and work together to secure the mauri of fresh water, and therefore a reliable and secure supply for the future. At the time of publishing, the three Wairarapa councils and GWRC are establishing a Water Resilience Governance Group to oversee delivery of the WWRS and resulting action plan.

1. Water quality – As identified in the Ruamāhanga Whaitua Implementation Programme, surface and groundwater quality in the Wairarapa needs to improve. The Whaitua Committee determined that in many places, levels of E.Coli and periphyton were unacceptable to the local community. Achieving these improvements will require fundamentally changed land use practices.

Wairarapa's urban areas experience relatively frequent "boil water notices" due to malfunctions in municipal supply networks like infiltration of pathogens or high sediment loads from floodwater contamination. With the introduction of the Water Services Act 2021, drinking water suppliers are now required to provide safe drinking water to consumers. The national drinking

water regulator Taumata Arowai is specifically tasked with enforcing compliance with the legislative framework. It is reasonable to expect that local councils will need to invest more in addressing these supply quality issues.

The community has indicated support for a mix of non-regulatory and regulatory approaches that will support improvement in water quality. The primary vehicle for this work is the Whaitua Implementation Programme coordinated by GWRC, and involving a range of partners including local councils, mana whenua iwi, landowners, businesses environmental organisations and community organisations.

2. Water quantity – Most water use in the Wairarapa relies on takes directly from rivers or bores and there is little or no water storage. The Ruamāhanga Whaitua process identified over-allocation of water in some areas of the Wairarapa. Water takes from rivers carry conditions that require the take to reduce (or cease) when river levels reach a certain low level.

In the primary industries, water storage supplied by direct extraction from surface and groundwater is currently limited to a few farms and vineyards, however hydrology knowledge of Wairarapa catchments is limited. Reliable water provides certainty to rural activities as it improves the quality, quantity and timing of crops. Masterton has an average of one day of municipal water storage during winter which reduces to just half a day in summer.[64] Other towns in Wairarapa have similar issues and their small councils are already facing considerable costs for upgrading and maintaining their municipal water infrastructure relative to their rating base. Without additional storage, together with other water resilience modes, this situation will only get worse with climate change and population growth compared to other parts of our region. Over the summer months, some businesses already report experiencing reduced operations to conserve water resulting in lost productivity, reduced hours and lower income for employees. Wairarapa's rural sector will continue to suffer, if not decline, if it's unable to adapt or take up new opportunities that climate change will bring. A catchment-wide rather than individual farm holding approach is required to enable the scale and nature of such changes to be successfully implemented.[65]

The Wairarapa Water Resilience Strategy identifies principles and criteria for priority uses that help set the course for the work ahead. The actions are structured into four focus areas:

- Water capture, which could include managed retention, constructed storage, and micro-storage to capture hill country attenuation. Some of these interventions would be experimental but the WWRS provides a set of principles to evaluate storage proposals.
- Natural attenuation, including restoring wetlands, riparian sites, and afforestation.
- Allocation, which would involve moving water allocation to maximise beneficial use, improving proactive planning and the allocation system rather than working with individual consents.
- Adaption - land use adaptation through introduction of crops that use less water and encouraging mixed farming.

Additional information about water quantity will be provided by the SkyTEM project which is mapping the arrangement of possible groundwater resources throughout the Wairarapa. Initial results of this aerial survey are due to be delivered in 2024.

3. Collaboration and partnerships are the future – The WWRS emphasises the importance of partnership where all interests work towards solutions that offer multiple benefits, including through a range of complementary actions across demand, supply, data and information, regulatory systems, and frameworks. GWRC has formally adopted the strategy and it is captured as an initiative in this chapter. Other councils and partners have agreed in principle to support implementation of the work.

The complexity of the issues and range of solutions has already brought several organisations together, including regional and local councils, Wellington Water, Rangitāne Tū Mai Rā Trust Wairarapa, Ngāti Kahungunu, WellingtonNZ, central government and other local interest groups. An example of working in partnership is the Waingawa Estate water resilience project, which WEDS and CDC facilitated securing co-funding for through local and central government.

Looking ahead, the Wairarapa Economic Development Strategy places emphasis on water resilience and the WWRS creates a 10-year vision for water resilience planning. Strong leadership, sustained focus and tangible action is required to meet the sustainable water challenges, improve productivity and build resilient infrastructure for a better future.

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
		Implement solutions to enable water accessibility and security in Wairarapa				
	Wairarapa Water Resilience Strategy (WWRS) implementation plan Wairarapa requires secure, safe and optimised water solutions to provide for continued economic development and growth	Develop a WWRS implementation plan among key stakeholders and define the initial governance structure and work programme that encompasses all four rooms of the resilience strategy framework (capture, attenuation, allocation, adaptation)	Water Resilience Steering Group (interim governance)	MDC, CDC, SWDC, GWRC, WEDS, Rangitāne o Wairarapa, Ngāti Kahungunu	2024 – 2025	Complete
		Deliver the public viewer of the SkyTEM lithology model of the Ruamāhanga valley	GWRC, GNS	MBIE, Rangitāne o Wairarapa, Ngāti Kahungunu	2024 – 2025	Complete
		Collate and improve information to support the strategic and economic case for action and investment in water storage and other options to meet municipal, rural, and commercial demand. This will identify the nature and areas of need and the options for solutions in different locations of the Wairarapa, enabling prioritisation of coordinated action	Wairarapa Water Resilience Strategy Governance Group	MDC, CDC, SWDC, GWRC, WEDS, IrrigationNZ, Rangitāne o Wairarapa, Ngāti Kahungunu	2024 – 2025	Delivery
		Identify and advance key economic development projects within the WWRS Work Programme to strengthen Wairarapa's economic resilience, attract investment, and support sustainable growth. Facilitate collaboration and knowledge-sharing to build water resilience across Wairarapa industries		MDC, CDC, SWDC, GWRC, WEDS, Rangitāne o Wairarapa, Ngāti Kahungunu, Wairarapa Water Users Society	2025 – 2027	Delivery

ENABLER

Resilient infrastructure

Six principles of resilient infrastructure consistent with its use in this chapter are that resilient infrastructure:[66]

1. Must be able to adaptively transform.
2. Must be environmentally integrated, for instance recognising the importance of the natural environment.
3. Must be protected by design. This requires active up-front consideration of the hazards that could face an asset once delivered.
4. Must be conducive to social engagement. Resilient infrastructure must boost people's awareness of how best to use it considering present and future challenges.
5. Must be a shared responsibility. This principle outlines the concept of collaborative data and knowledge sharing regarding an asset.
6. Will require continuous learning. This means decision makers regularly devising strategies to optimise the ability of infrastructure to cope with what's ahead.

Public infrastructure is infrastructure owned by, and/or available for use by, the public and is a fundamental part of how local and central government contributes to the wellbeing of our communities. Our infrastructure provides many services that make our region a great place to live, work and play, while also having essential functions that impact the quality of our environment.

Mana whenua have a strong interest in the planning and decision-making for infrastructure in our region. Infrastructure development can support sustainability goals, the realisation of rangatiratanga, Treaty partnership, and Māori economic development. Infrastructure that supports people and nature to thrive is seen as part of kaitiakitanga, as is the use of sustainable, green and resilient infrastructure and low emissions transport options.

Strategic public infrastructure investment can provide a range of economic benefits and economic development opportunities. For example, decisions we make about what and when regarding infrastructure investment can impact on things such as improving our productivity, our transition to a low emissions economy and increasing our resilience to climate change.

The Future Development Strategy (FDS), the regional spatial plan for the Wairarapa-Wellington-Horowhenua region, has six strategic directions. One is "ensuring we have the infrastructure we need to thrive" and our REDP aims to complement this by improving our productivity and economic resilience.

Investment in public infrastructure raises GDP. For example, a 1% increase in infrastructure expenditure by central government raises regional GDP by 0.14%.[67] The economic benefits are more than just the creation of short-term stimulus into the economy through employment and act as an enabler for the longer-term conditions for future growth and prosperity.

Our region is planning investments across a range of transformational public infrastructure in coming years in line with the FDS. Significant infrastructure projects including the Cross Valley Transport Connection, investigations into a Petone to Grenada connection, and an Energy Road Map to prepare for long-term regional electricity capacity while reducing emissions are also being considered. These projects bring possible benefits and risks for urban, social and economic development in their surrounding communities. It is important to take an intentional and co-ordinated approach, so the wider benefits of these projects are optimised and realised.

Long-term plans (LTPs) for all councils across our region indicate significant infrastructure expenditure on transport, water and construction over the next 10 years. The challenge is how to leverage these investments for maximum economic, social and environmental benefit, including protecting against economic loss from emergency and other resilience events.

We will continue to work with infrastructure providers to ensure investments being made in infrastructure projects over the coming years lead to increased skills, talent, education and technology opportunities while building resilience into infrastructure.

The Wellington Regional Lifelines Group completed a study in 2019 which considered the interdependencies of 16 infrastructure providers in order to identify a step change improvement to the Wellington region's resilience to a large earthquake.[68] It identifies a range of infrastructure projects required to provide that resilience, such as Seaview Wharf seismic strengthening, resilience of airport connectivity and substations and cable.

In addition to the projects identified in the Lifelines work, key flood resilience projects of scale in this region include:

1. The flood protection aspects of the Te Wai Takamori o Te Awa Kairangi Riverlink project
2. Planning for and building flood protection for Masterton town centre.

The WRLC started a Regional Adaptation Project in early 2024. This looks at a range of climate change hazards and will highlight, among other things, what key infrastructure assets may be impacted and/or protected in the region.

Issues and opportunities

There is an opportunity to align with, and complement, the FDS to enable, support and, in some cases, activate certain aspects of it, including the work being undertaken on an industrial land study. Our region has not previously demonstrated a co-ordinated approach towards industrial land use nor taken a region-wide view on how and where to bring businesses into our region.

Building and maintaining resilient infrastructure will help support the opportunities and unlock potential in the key sectors focused on in this plan. Initiatives that improve connectivity of freight and commuters will become increasingly important as our regional population grows. Examples include the electrification of the rail service north of Kāpiti Coast to Levin, and improvements to the safety and resilience of the Ōtaki to north of Levin transport corridor.

The FDS identifies the following five points as important aspects to remember when making infrastructure decisions to support prioritised housing and economic development areas. These points are relevant when considering the resilience of our infrastructure also:

- We must maximise the use of our current and planned infrastructure and investments across a range of infrastructure types, including transport, energy, water and social
- We must fully unlock the development potential of our strategic public transport system, including current and future rapid transit-oriented corridors to enable mode shift and reduce regional transport emissions
- We need to look for ways to maximise the leverage of co-investment opportunities
- Speeding up required infrastructure will be of benefit
- We cannot afford all the infrastructure required.

There are five key areas that need to be targeted to build solid foundations that support resilient infrastructure:

1. Understanding and agreeing at a regional scale what resilient infrastructure is required and how and when this should be provided – This needs to be undertaken in context of the five points above noted in the FDS. One example is the work undertaken by the Wellington Lifelines Group on a resilience business case[68] which could be supported to deliver a more reliable and resilient region. Another example is the work being undertaken by the WRLC on a Regional Adaptation Project.

2. Ensuring the region has all the infrastructure needed to be productive – building resilience into the economy – An example is the recent study on industrial land where, as a region, we have identified there is a shortage of industrial land to support growth. This study confirms the scale of this shortage and identifies where new industrial sites may be developed, ensuring that these new sites provide resilience for the long term. Supporting and enhancing regional resilience would ensure our region could continue to work or recover quickly in the aftermath of an adverse event. Improving our regional resilience has economic and wellbeing dimensions.

3. Ensuring the infrastructure we currently have continues to be resilient to shocks and shorter-term impacts – For instance, the FDS will support development of the Wellington rail programme business case to invest in addressing inconsistent customer experience and capacity. It would also update infrastructure to safely accommodate additional trains and configure the network to make it less vulnerable to disruptions. This will ensure that people and freight continue moving to support the economy.

4. Building resilience into current infrastructure as we upgrade or renew this infrastructure – Much of our infrastructure such as roads and three waters infrastructure is old and was not built at a time when resilience to climate change in particular was a consideration. We need to ensure, for instance, that when upgrading or renewing roading networks close to the coast or increasing the size of a stormwater pipe during renewals that we provide for resilience.

5. Addressing skills shortages – Providing for resilient infrastructure will require the development and growth of the construction and infrastructure sector workforces. These sectors have already grown in recent years and are currently experiencing skills shortages. Construction and infrastructure were identified as two of the six priority sectors by the Wellington Regional Skills Leadership Group, which also highlighted opportunity for increasing diversity in these workforces as they grow.

SO	Opportunity	Actions	Lead	Key partners	Estimated timeframe	Stage
		Prepare our region for commercial and industrial developments				
	Industrial land requirements Planning is required to ensure sufficient available land is ready to support industrial developments across our region. This will support and retain new and emerging businesses and attract others to our region, enabling ongoing sustainable development for our regional workforce to grow through employment opportunities	Identify the requirements for industrial land in our region considering social and environmental aspects, and interventions needed to provide land	WRLC	GWRC, territorial authorities, iwi, business associations, large industrial land users including CentrePort, large developers/land owners, WNZ	2023 – 2024	Complete
		Following the planning for industrial land, there will be a need for relevant councils to undertake district plan changes to zone land for industrial use, ensuring that enough land is provided for this use within the region into the future	Relevant councils		2024 – 2026	Planning

Photo: Mark Tantrum

Implementing the plan

Overall governance, management, and how we will work alongside each other to implement the Regional Economic Development Plan is highlighted in the table below:

Governance	Steering group	Programme management office	Initiatives
Overall programme governance sits with the WRLC as decision-makers across our region with responsibility for this plan. The WRLC is supported by the WRLC secretariat, responsible for oversight, monitoring and reporting on its work programme.	The steering group made up of business, mana whenua/Māori economic development, and local and central government representatives are responsible for the successful operational delivery of our plan and incorporate different perspectives from across our region. It is chaired by the Chief Executive of WellingtonNZ, the regional economic development agency.	The programme management office (PMO) co-ordinate planning and reporting to the steering group and WRLC secretariat to ensure requirements are met, including inputs to decision-making forums that support the WRLC. The PMO and wider WNZ team work alongside project leads of initiatives to identify support required, networks and funding pathways, to help successful delivery of the initiatives.	Ultimately, the accountability and success of each initiative remains with the project lead. Project leads and teams manage their initiatives and work with the PMO to identify support required and report on progress, risks and issues on a regular basis. This contributes to a dashboard to oversee the operational delivery of the plan and outcomes achieved.

Monitoring and reporting

The following table highlights how we monitor our regional performance. This is complementary to the WRLC dashboard reports that provide a holistic measure on interrelated areas such as infrastructure, transport and the transition to a low emissions economy. An annual REDP summary is published each year highlighting progress on implementation, including intiative highlights and latest data.

MONITORING METRICS: Indicators to be used to monitor progress against our strategic objectives

REGIONAL INDICATORS: Indicators to be monitored at a regional level

QUALITY OF LIFE

Overall satisfaction with life
Measuring the **overall satisfaction with life** of residents provides an indication on social wellbeing.
Frequency: Biennially
Source: Quality of Life Survey, Nielsen's

AIM TO GROW

The ability of income to meet every day needs
Monitoring the percentage of residents' **ability to meet every day needs with their income** provides an indication of the social and economic health of our region's residents.
Frequency: Biennially
Source: Quality of Life Survey, Nielsen's

AIM TO GROW

EMPLOYMENT

Jobs filled
The number of jobs filled across our region provides an indication of our regional economic performance.
Frequency: Quarterly
Source: Jobs filled, StatsNZ

GROW 100K IN 30 YEARS

Jobs and outcomes created through the initiatives in this plan
Indicates the impact of initiatives from the plan on our regional economy and the creation of jobs.
Frequency: Annually
Source: Reports from project leads

INITIATIVE OUTCOMES

Labour force participation rate by ethnic group
(European, Māori, Pasifika and Asian)
Frequency: Quarterly
Source: Household Labourforce Survey, StatsNZ

AIM TO GROW

Unemployment by ethnic group
(European, Māori, Pasifika and Asian)
Frequency: Quarterly
Source: Household Labourforce survey, StatsNZ

AIM TO REDUCE

GDP per capita will be used to capture the average economic wellbeing of our region over time
Frequency: Annual
Source: Regional GDP from StatsNZ divided by estimate population, StatsNZ

AIM TO GROW

SUB-REGIONAL INDICATORS: Indicators to be monitored at a territorial authority level

Population
Our population is expected to increase by up to 200,000 in the next 30 years. Monitoring this growth is important for understanding the infrastructure and resource needs of our region.
Frequency: Annual
Source: Estimated population, StatsNZ

Estimated working-age population
Monitoring the change in the working-age population by ethnic group in each territorial authority provides an indication of the changing workforce over time.
Frequency: Annual
Source: Estimated population, StatsNZ

The average income per capita determines the average per-person income and evaluates the standard of living of our population.
Frequency: Annual
Source: Infometrics

The number of people on the **Work-Ready Job Seeker benefit** is a timely measure that provides an indication of how many people in our regional economy are ready and seeking work.
Frequency: Quarterly
Source: Main Benefits report, MSD

KEY SECTORS

GDP contribution to the region
Frequency: Annual

Growth in the number of jobs filled
Frequency: Annual

The number of business units
Frequency: Annual

Photo: A Waka Odyssey, 2018 New Zealand Festival. Photo by Capture Studios

Glossary

The following Māori terms have been used in this plan:

Ahikāroa	Refer to moemoea page 5
Hapū	Sub-tribe/kinship group
Hauora	Health
Iwi	Tribe/extended kinship group
Kai	Food
Kāinga	Home
Kaitiaki	Guardian
Kaitiakitanga	Guardianship
Kaupapa	Programme
Kupu	Word
Manaaki	Hospitality/ take care of
Mana whenua	Authority over land or territory
Manuhiri	Visitor
Marae	Meeting ground
Mareikura	Female spiritual being
Mātauranga	Knowledge/wisdom
Mātāwaka	Māori from iwi outside our region
Moana	Ocean
Moemoea	Vision
Mokopuna	Grandchild/ren
Pā	Fortified village
Pou	Pillars
Rangatahi	Youth
Rangatira	Chief
Rangatiratanga	Chieftainship
Takiwā	Region
Tamariki	Children
Tangata whenua	Local people/people born of the whenua
Tangihanga	Funeral
Te Moananui a Kiwa	Pacific Ocean
Te Upoko o Te Ika	Wellington region
Teina	Mentee/junior relative
Tikanga	Correct procedure/ custom
Tino rangatiratanga	Self-determination
Tiriti o Waitangi	Treaty of Waitangi
Tuakana	Mentor/more senior branch of the family
Uri	Descendant/successor
Wānanga	Tribal knowledge
Whakapapa	Genealogy
Whakatauākī	Proverb/significant saying
Whare	House
Wharekai	Dining hall
Whatukura	Male spiritual being
Whānau	Family
Whanaungatanga	Kinship
Whenua	Land

Acronyms

The following acronyms have been used in this plan:

CDC	Carterton District Council
CHQ	Creative HQ
DOC	Department of Conservation
EDKB	Kāpiti Coast Economic Development Kotahitanga Board
FDS	Future Development Strategy
GDP	Gross Domestic Product
GWRC	Greater Wellington Regional Council
HCC	Hutt City Council
HDC	Horowhenua District Council
KCDC	Kāpiti Coast District Council
MBIE	Ministry of Business, Innovation and Employment
MCH	Ministry for Culture and Heritage
MDC	Masterton District Council
MFE	Ministry for the Environment
MOE	Ministry of Education
MOT	Ministry of Transport
MPI	Ministry for Primary Industries
MSD	Ministry of Social Development
OECD	Organisation for Economic Co-operation and Development
PCC	Porirua City Council
REDP	Wellington Regional Economic Development Plan
STEM	Science, technology, engineering and manufacturing
SWDC	South Wairarapa District Council
THCL	The Horowhenua Company Ltd
TPK	Te Puni Kōkiri
UHCC	Upper Hutt City Council
UNESCO	United Nations Educational, Scientific and Cultural Organisation
WCC	Wellington City Council
WEDS	Wairarapa Economic Development Strategy
WNZ	WellingtonNZ
WRLC	Wellington Regional Leadership Committee
WWRS	Wairarapa Water Resilience Strategy

End notes

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11 SupraWellington | March Years 2023 | StatsNZ national production-based GDP for each industry modelled down to TA level by Infometrics using the Linked Employer Employee Data (LEED)

12 SupraWellington | March Years 2023 | Infometrics Regional Industry Employment Model (RIEM). The model draws heavily on quarterly and annual Linked Employer Employee Data (LEED) published by Stats NZ. It includes both employees and self-employed and is based on workplace address.

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14 SupraWellington | March Year 2023 | Knowledge intensive employment is measured as employment in industries (measured at the 7-digit industry level) which are defined as Knowledge Intensive. Knowledge-intensive industries are industries that satisfy two basic criteria: At least 25 per cent of the workforce must be qualified to degree level and at least 30 per cent of the workforce must be employed in professional, managerial, as well as scientific and technical occupations.

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22 SupraWellington & TA level | March Years 2023 | StatsNZ Household Labour Force Survey, TA level is obtained by applying trends in Jobseekers at TAs to HLFS

23 SupraWellington & Various TAs | March Year 2023 | Knowledge intensive employment is measured as employment in industries (measured at the 7-digit industry level) which are defined as Knowledge Intensive. Knowledge-intensive industries are industries that satisfy two basic criteria: At least 25 per cent of the workforce must be qualified to degree level and at least 30 per cent of the workforce must be employed in professional, managerial, as well as scientific and technical occupations.

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