

Beyond 2025 Southland Update

20 October 2022



BEYOND 2025
SOUTHLAND

Regional Long Term Plan

He ara whakamua, he ara hou a Murihiku

Moving forward, new pathways for Murihiku



Content

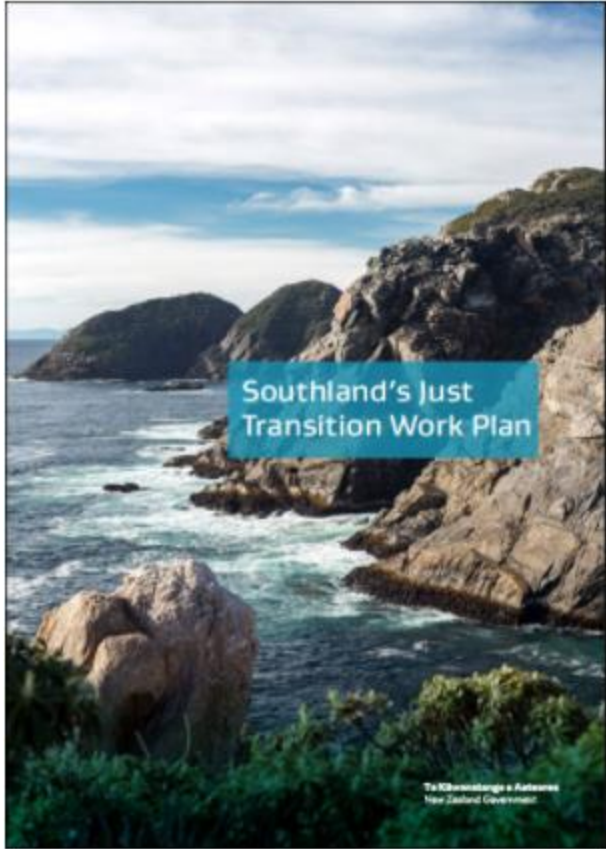


1. Setting the scene – Just Transition
2. Refreshing & building on SoRDs
3. Beyond 2025 process
4. Five pillars and 16 workstreams
5. Next steps

Southland Just Transition Goal...



“Build the region’s economic, environmental and social resilience through & beyond the planned closure of the New Zealand Aluminium Smelter in December 2024.”



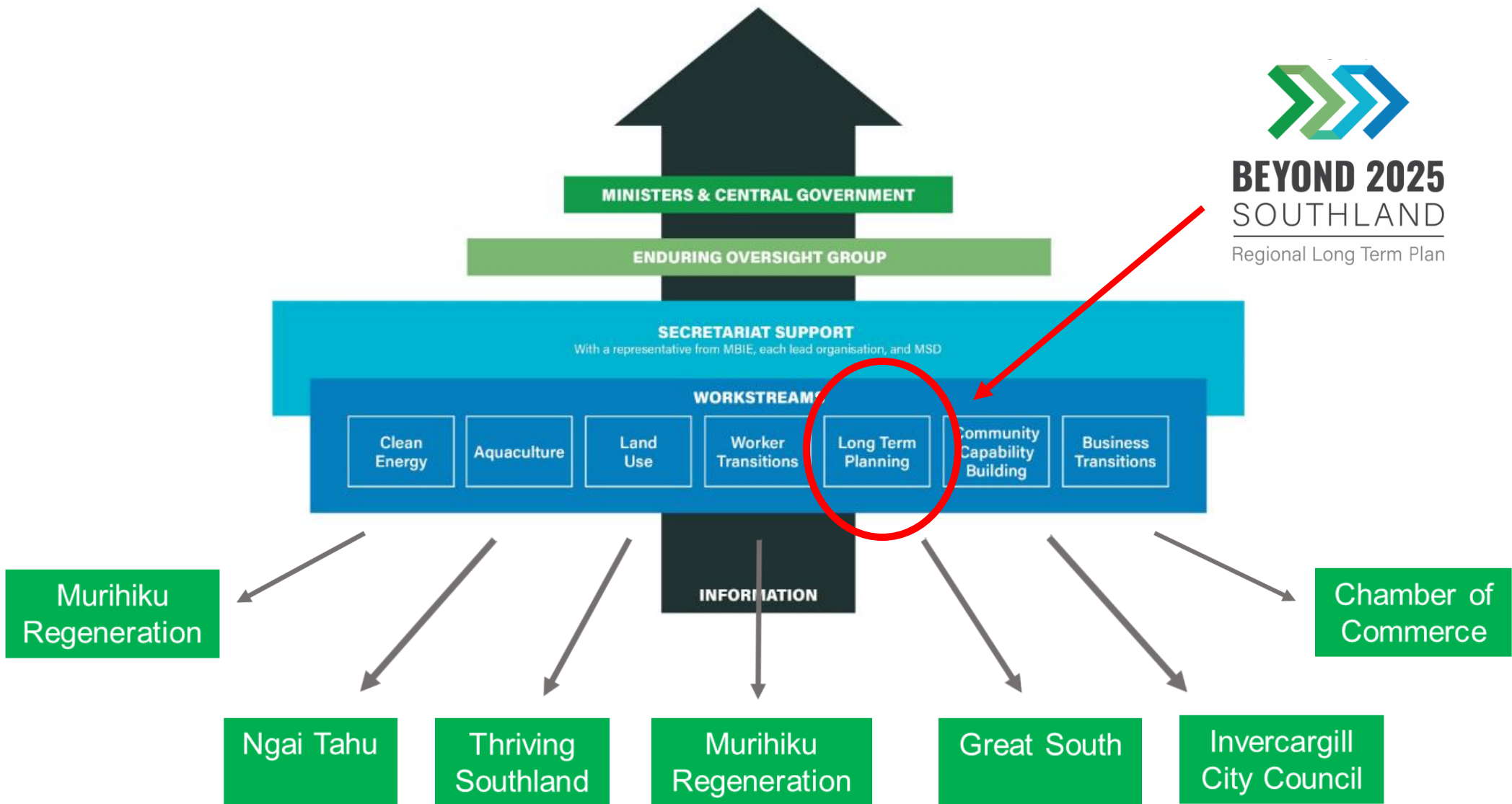
BEYOND 2025

SOUTHLAND

Regional Long Term Plan

For more information visit **southlandjusttransition.nz**

Just Transition Approach



Long-term Planning Workstream Goal



“Southland has updated its Southland Regional Development Strategy, which works toward a good life for all. The plan has strong community support”

Also ensuring a longer-term lens is applied to the other 6 workstreams of the Just Transition process – many of which are short-term focussed (considering proposed timeframe for closure of Tiwai)

Great South contracted by MBIE to deliver Long-term Planning Workstream

This is a Murihiku Southland plan, not a Great South plan

Great South's role is to facilitate the development of this plan through an inclusive process

18-month project with two staff seconded until its completion in **June 2023**



Bobbi Brown
Project Lead



Nic Wills
Project Advisor

The four arrows represent the four main pillars of the project - environment, economy, infrastructure and people.

"Beyond 2025" represents a desire to build on the 2015-2025 Southland Regional Development Strategy. This is also in line with Council plans.

Gifted by Waihōpai Rūnaka



The arrows symbolise moving forward into the future and are joined to symbolize a pathway and a shared journey.

The colours represent the Southland landscape - wilderness, farmland, rivers/lakes and the sea. They also match the colours used in the Southland Just Transition logo.

BEYOND 2025

SOUTHLAND

Regional Long Term Plan

This statement represents the Long Term Plan's desire to use the learnings of the past to guide the future.

He ara whakamua, he ara hou a Murihiku
Moving forward, new pathways for Murihiku

Partnership Approach



Significant Conversations and Engagement to date with a lot more to come:

LOCAL & CENTRAL GOVERNMENT

- Environment Southland, SDC, GDC and ICC
- Central Government (multiple ministries) & funders

KEY STAKEHOLDERS

Chamber of Commerce, Community Trust South; RSLG; Invercargill Licensing Trust; DOC; SIT, South Port; Invercargill Airport; Milford Opportunities; HWR Richardsons; MLT, Active Southland, Fonterra, HR Managers Group; Vodafone Foundation; Thriving Southland; COIN South; Southland Community Housing Group plus more

MANA WHENUA

Waihōpai Rūnaka; Hokonui Rūnaka; Awarua Rūnaka, Ōraka Aparima Rūnaka; Te Ao Marama, Te Puni Kokiri; New Zealand Maori Tourism;

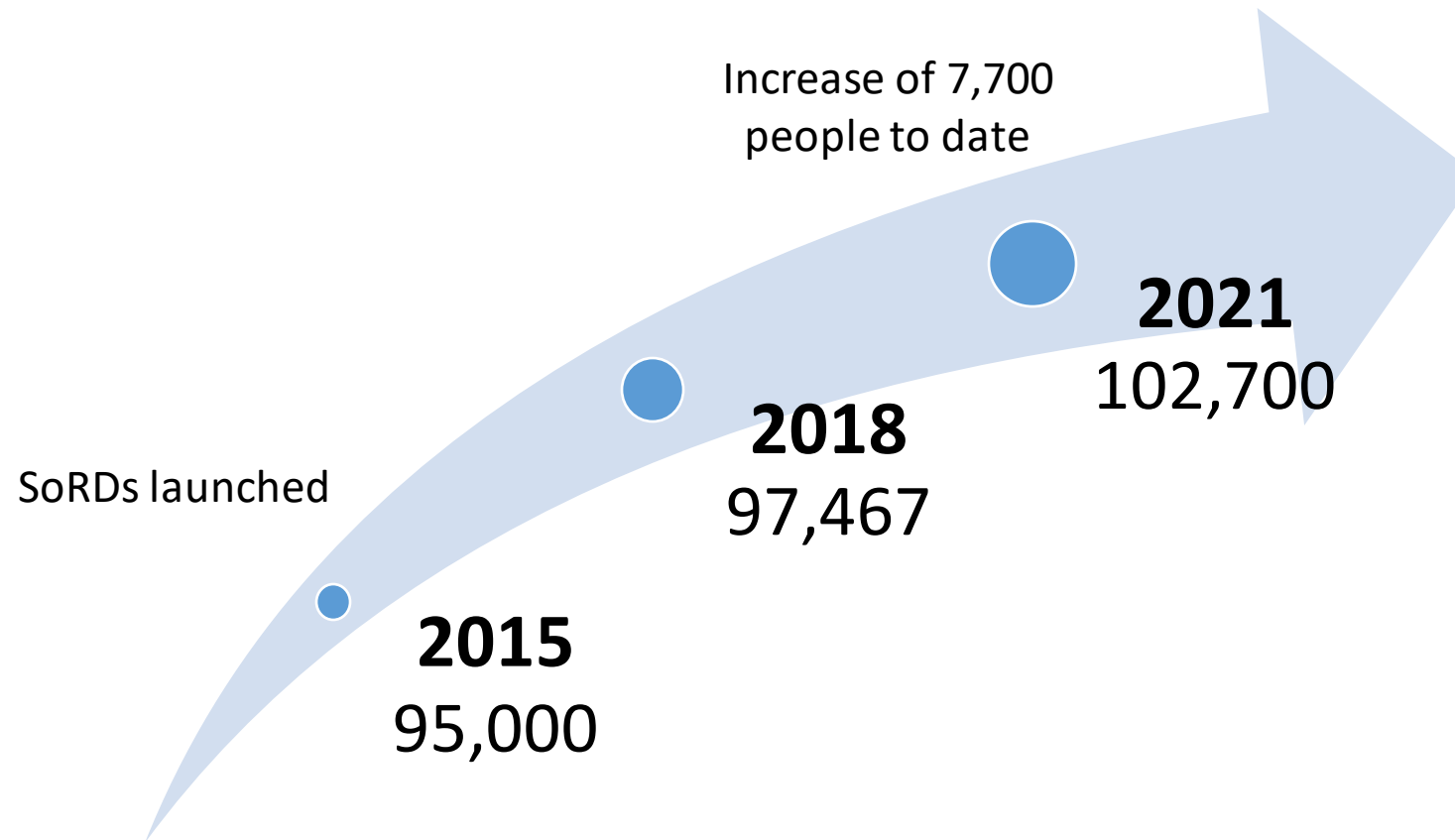
SECTORS & COMMUNITIES

Linked to each workstream and geographically as well as through other organisations such as councils



Refreshing and Building on SoRDS

We're tracking well to attracting 10,000 more people...

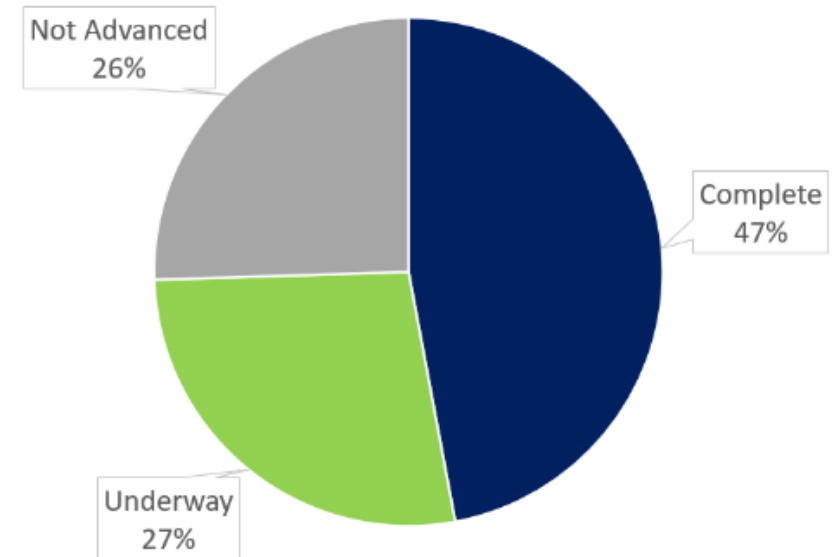


Two thirds of 51 actions completed or underway

Timing is right to review the regional strategy in line with Southland's Just Transition Work Plan

Some completed projects from the Action Plan include:

- Air New Zealand jet service to Invercargill from Auckland
- Milford Opportunities
- The Langlands Hotel
- Rejuvenated Invercargill CBD
- Southland Murihiku Destination Strategy 2019 – 2029
- Curio Bay tourism development
- Motorcycle Mecca tourism development
- Southland Murihiku Events Strategy 2020 – 2025



Three Key Challenges from SoRDs in 2015



1. Grow The Population

- Attraction
- Inclusion/participation
- Invercargill rejuvenation



2. Diversify The Economy

- Aquaculture
- Tourism
- International students



3. Strengthen Local Business

- Ease of doing business
- Innovation
- Primary sector extension

Two New Challenges



1. Grow The Population

- Attraction
- Inclusion/participation
- Invercargill rejuvenation



2. Diversify The Economy

- Aquaculture
- Tourism
- International students



3. Strengthen Local Business

- Ease of doing business
- Innovation
- Primary sector extension



1. Environment & Climate Change

- Carbon neutral target pathways
- Water
- Land



2. Key Resources & Infrastructure

- Housing
- Transport
- Future Energy
- Digital Connectivity & Data

Key Challenges integrated into Beyond 2025 Process



1. Environment & Climate Change

- Net Zero Southland
- Water
- Land



2. Diversify The Economy

- Aquaculture
- Destination Development & Management (Tourism)
- Technology & Manufacturing
- Future Crops & Food Opportunities



3. Strengthening Local Business

- Primary Sector
- Business Enablement, Capability & Competitiveness



4. Resources & Infrastructure

- Housing
- Transport
- Future Energy
- Digital Connectivity & Data



5. Grow The Population

- Retention and Attraction
- Skilled Workforce Development
- Urban Culture Development

TEAL = New or reframed priorities

On the face of it, we're looking good...



Unemployment Rate

2.6%



NZ Tradable Exports

15%



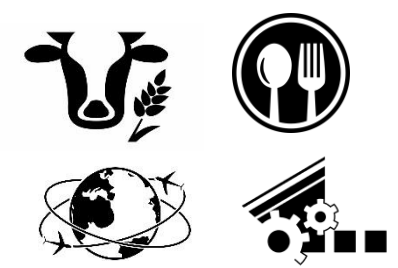
GDP

\$7.2 billion



\$5.5 billion

GDP generated for year ended March 2014.



Main southern industries

**Agriculture
Food & processing
Construction
Manufacturing
Tourism**

However, there are challenges...



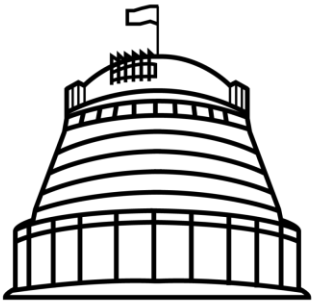
Housing



Static Population



Workforce Challenges



Significant legislation
change and reform
across many sectors



Tail end of dealing
with a pandemic

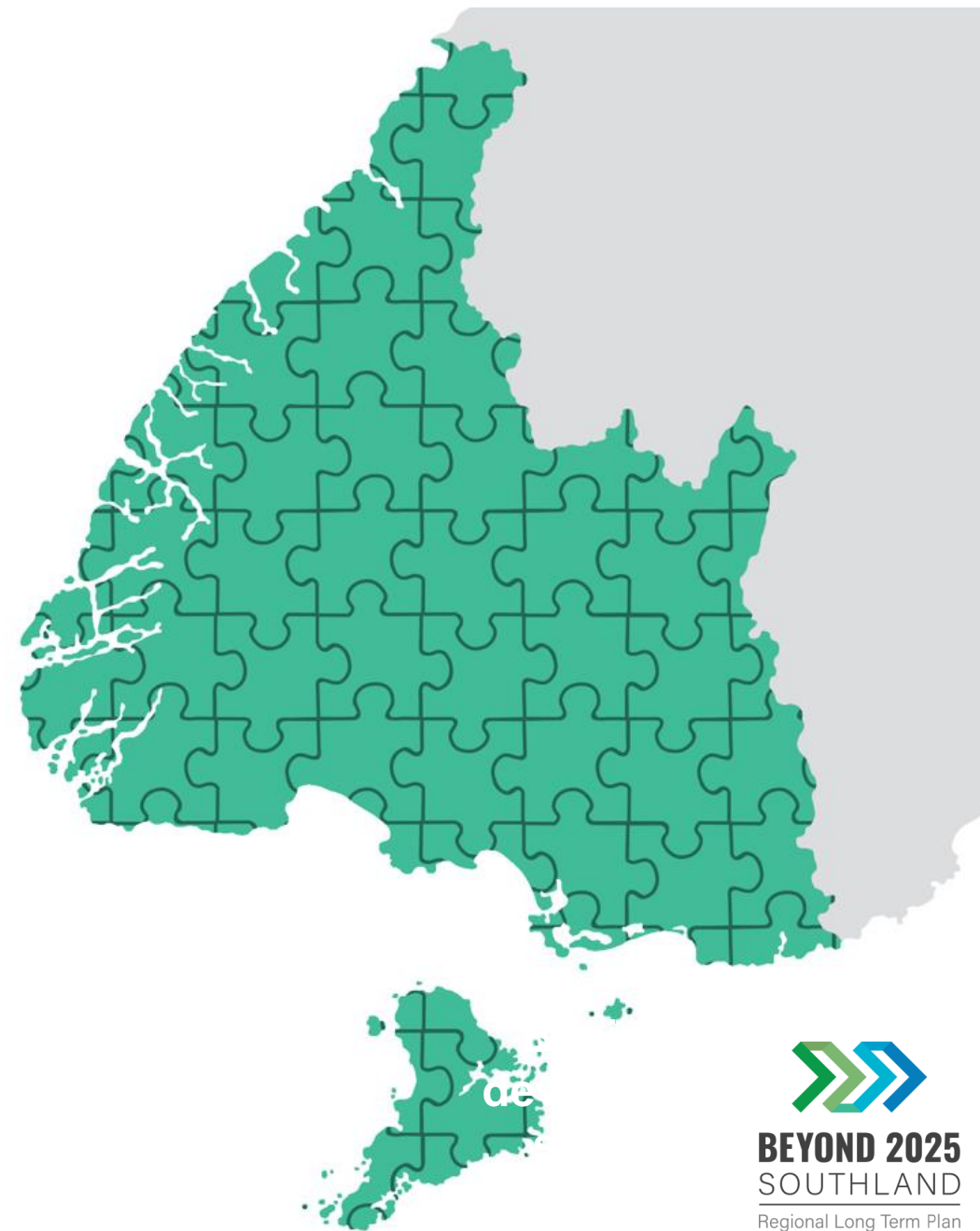


Long-term issues
such as climate
change, nutrient caps
& water quality are
being faced now

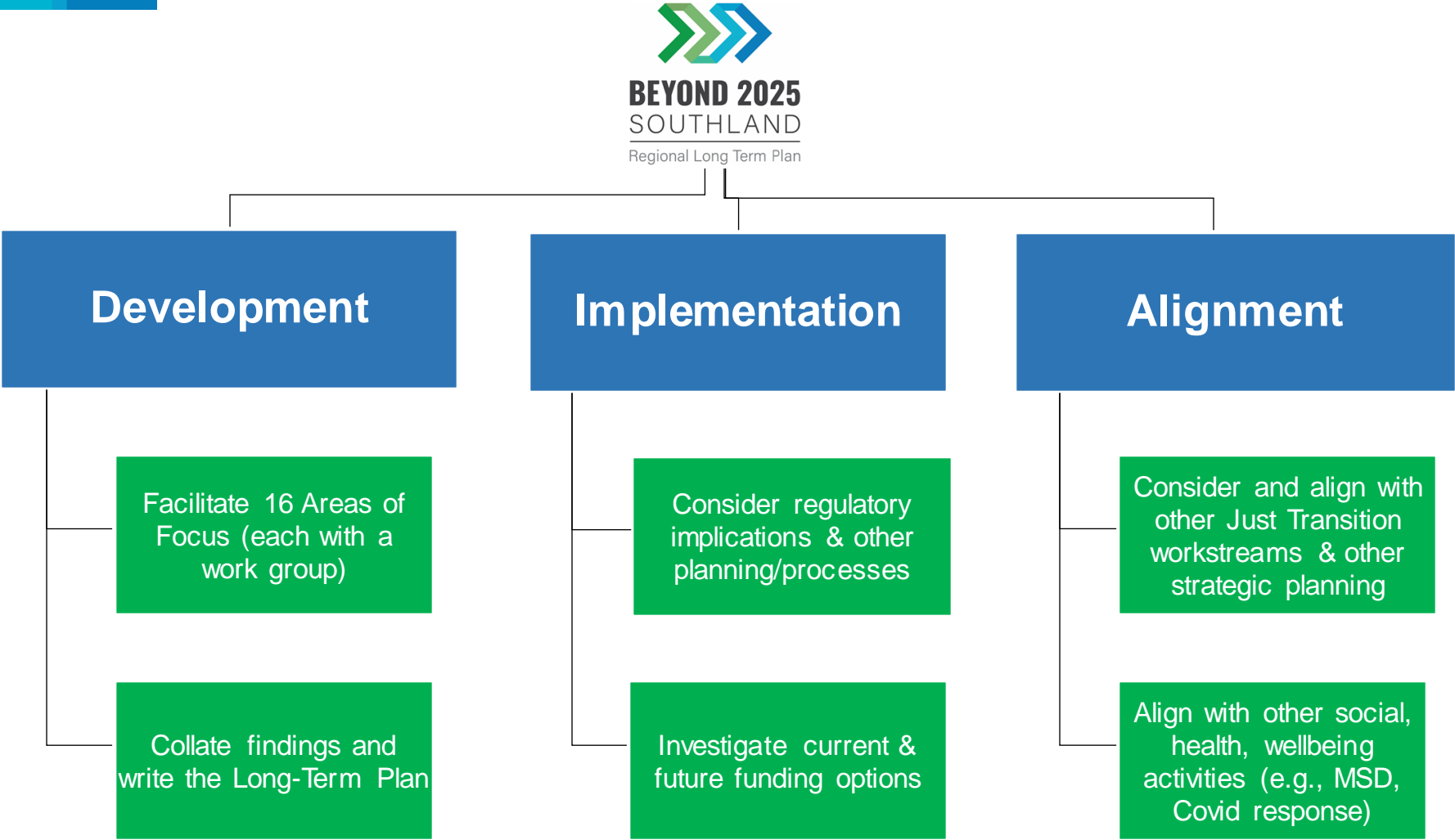


Everyone else is in
the same boat – very
competitive

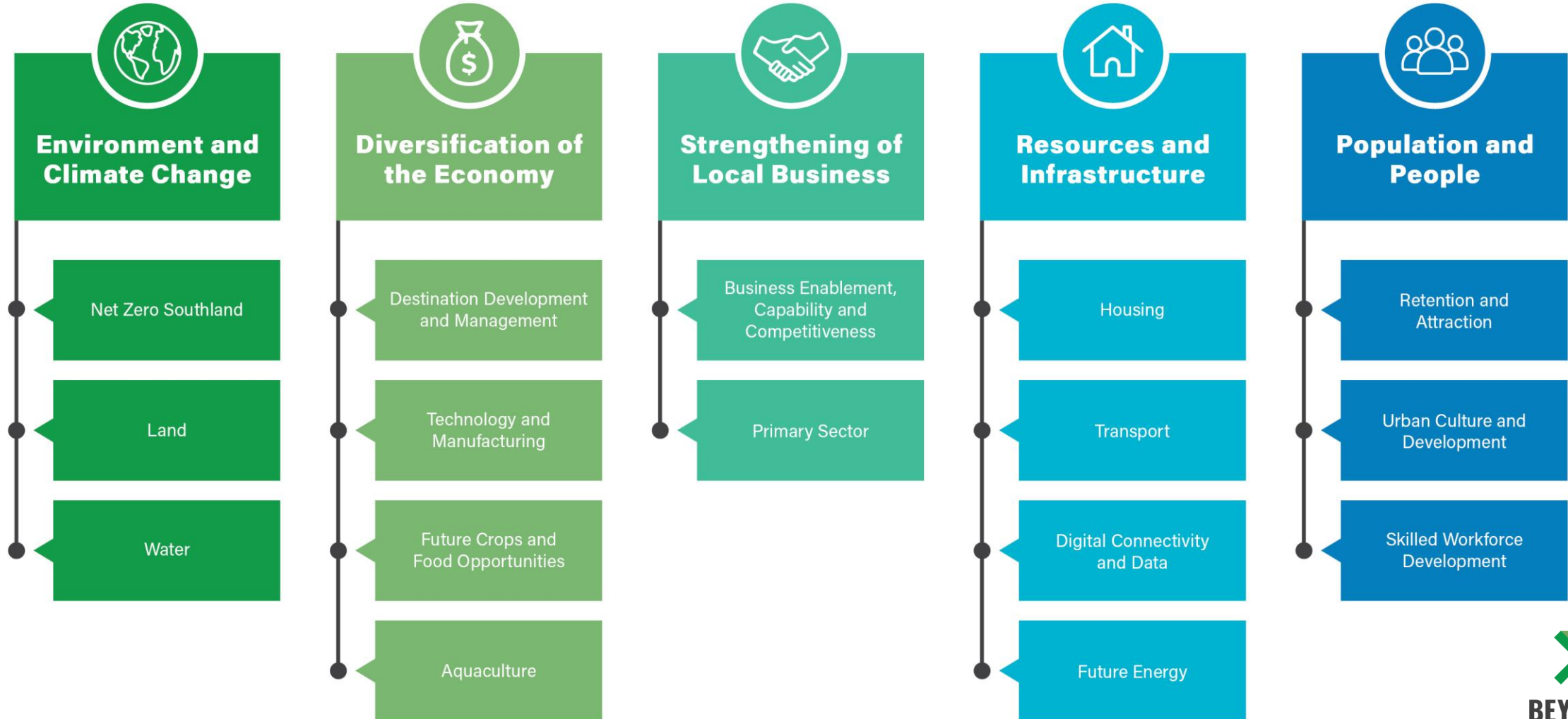
Beyond 2025 Southland has a key role linking pieces of the jigsaw together to create a clear regional voice and direction forwards



We've tailored the approach accordingly

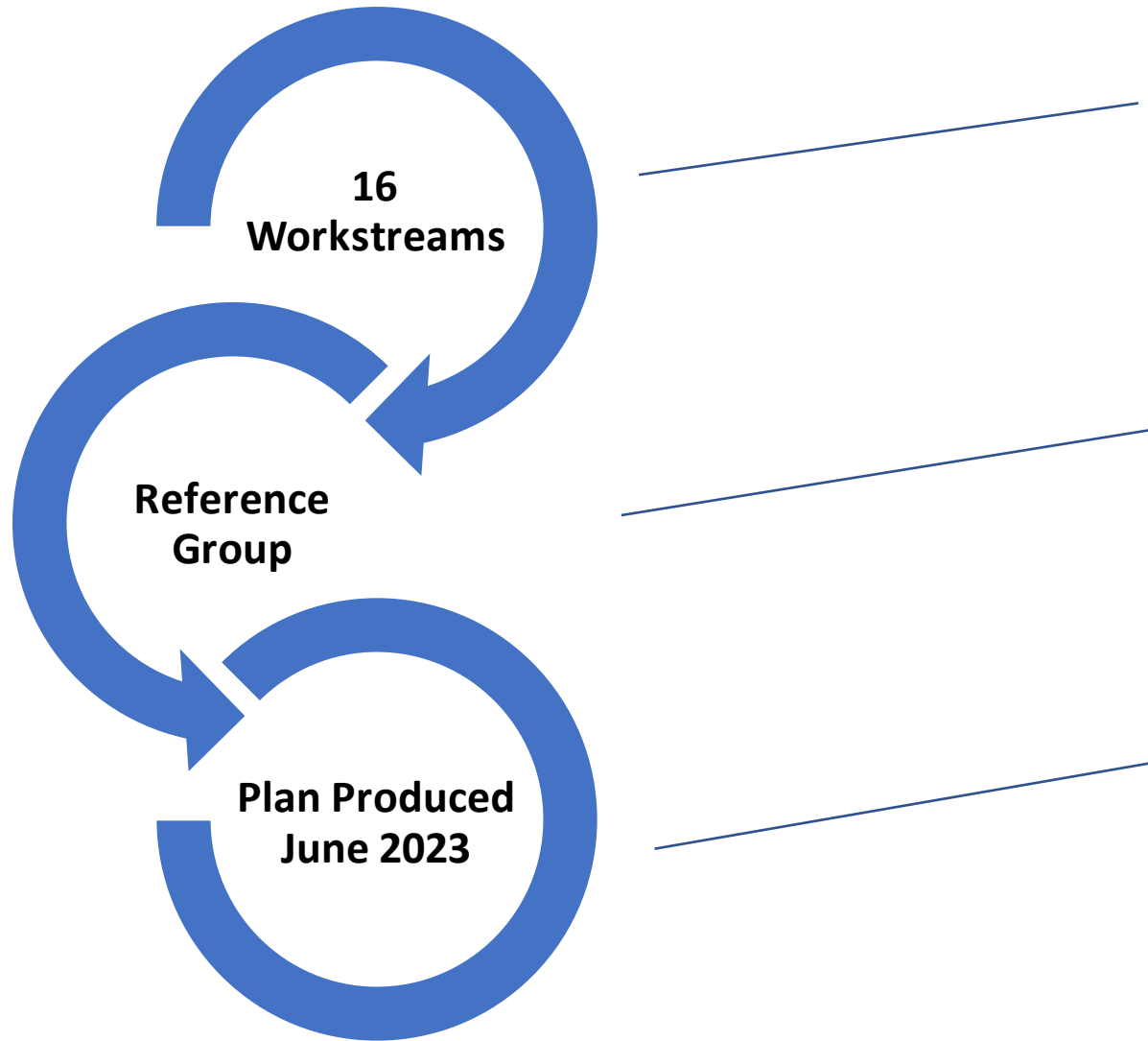


Beyond 2025 Structure – 5 Pillars, 16 Workstreams



He ara whakamua, he ara hou a Murihiku
Moving forward, new pathways for Murihiku

How it works...



Each of the 16 workstreams has its own methodology based on its key objectives. The process is inclusive, allowing a significant number of stakeholders and individuals to be involved.

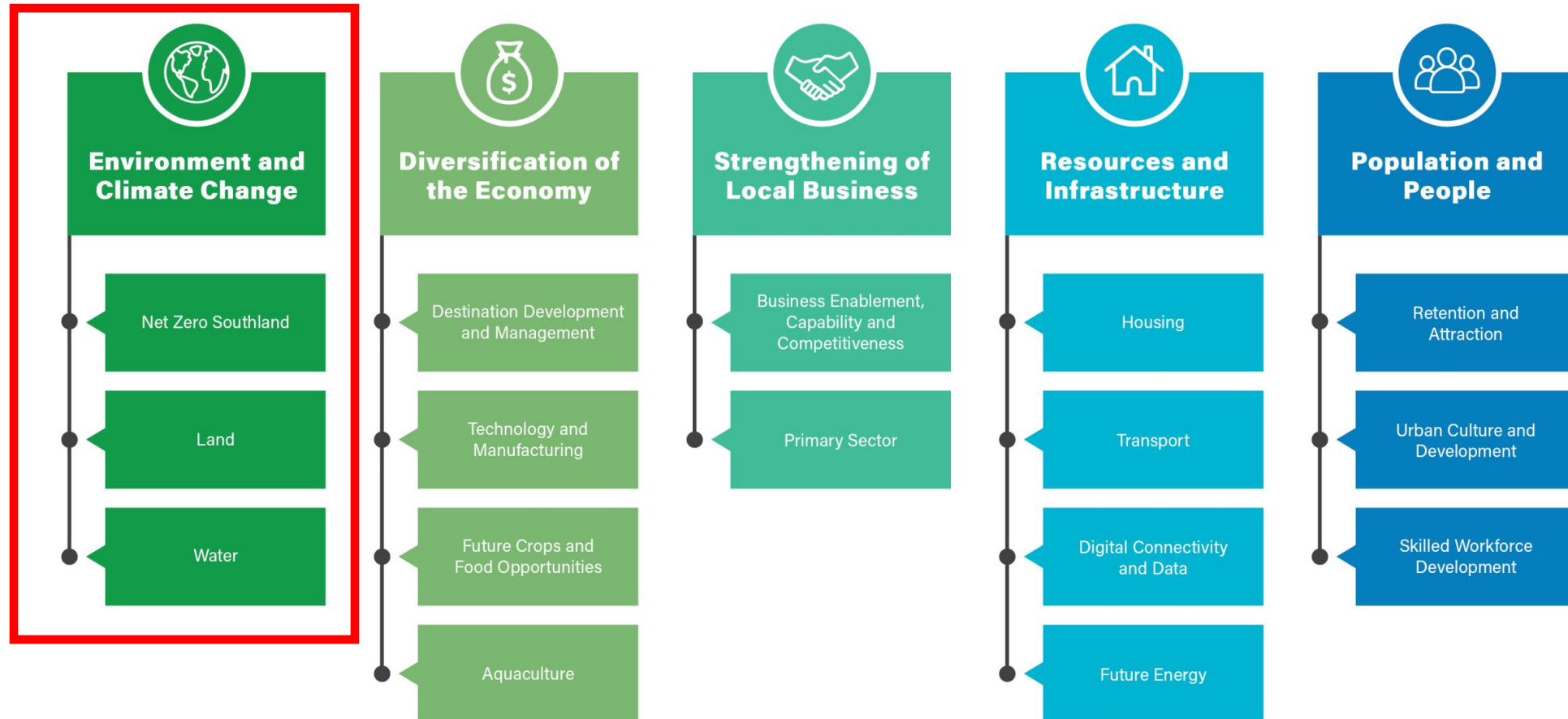
A “Reference Group” will be set up to help us consider and moderate findings that will emerge from the workstreams.

Plan launched mid-2023 with oversight from Just Transition EOG and Mayoral Forum

Pillar 1: Environment & Climate Change



Understanding the future impacts of climate and environmental changes on our land and water, while also focusing on reducing our carbon emissions



1. Net Zero Southland



BEYOND 2025
SOUTHLAND
Regional Long Term Plan

“To support and enable Southland Murihiku to achieve net zero emissions by 2050”

Net Zero Southland

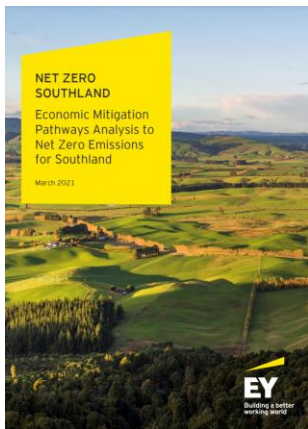
1

Facilitate the implementation of the Net Zero Southland report (2021)

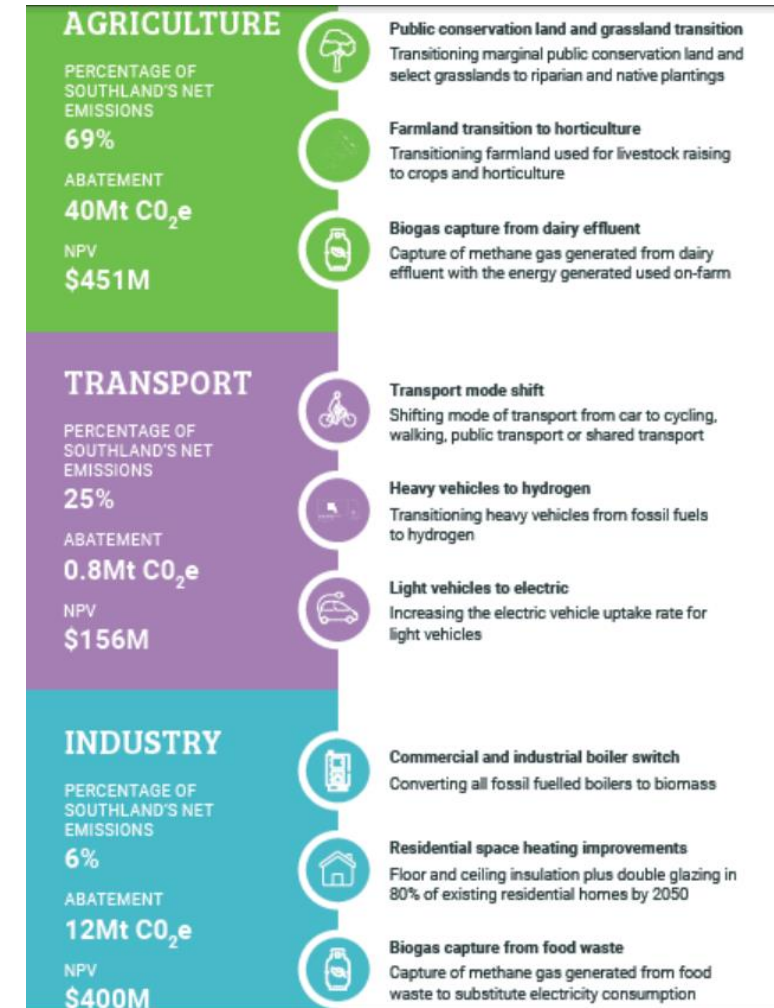
Deliverables

Action plan of 15 recommendations activated including the identification of required resource

Partnerships with key funders such as EECA



He ara whakamua, he ara hou a Murihiku
Moving forward, new pathways for Murihiku



Net Zero Southland

2

Coordinate existing efforts and apply a regional lens

Deliverables



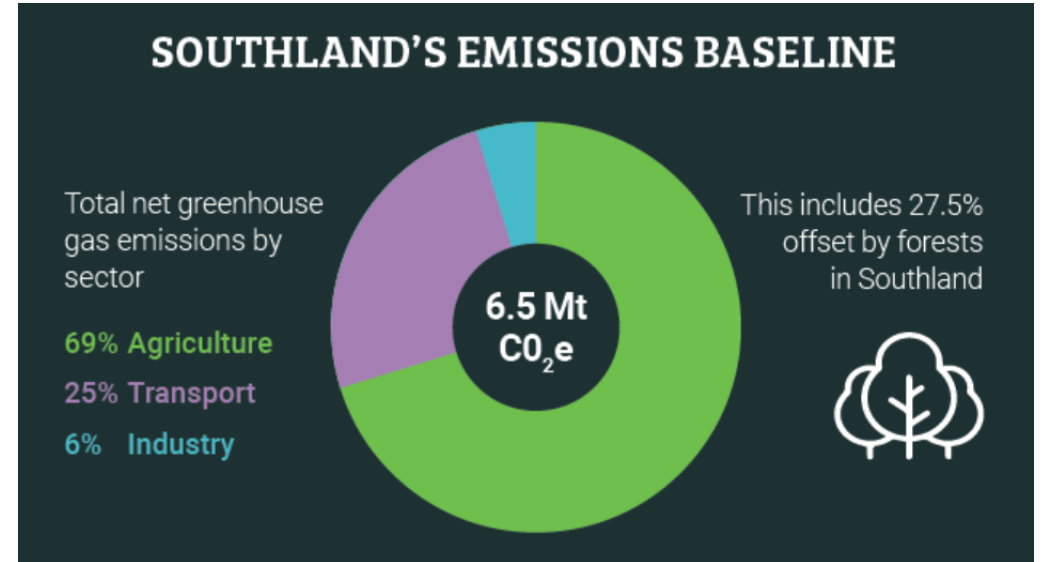
Southland's progress to achieve its net zero goal is regularly measured and communicated (Southland contributes 9.7% to NZ's gross emissions)

Southland is the first region to take part in EECA's Regional Energy Transition Accelerator (RETA) programme

Working with other local organisations to fast-track implementation

Opportunity for joint procurement of low-emissions technologies

He ara whakamua, he ara hou a Murihiku
Moving forward, new pathways for Murihiku



BEYOND 2025
SOUTHLAND
Regional Long Term Plan

Net Zero Southland



3

Support businesses to achieve their carbon abatement pathway goals

Deliverables

- ✎ Increase number of businesses supported to mitigate their emissions – to date 53 businesses are on a decarbonisation journey
- ✎ Convert all fossil-fuelled boilers to biomass or electricity by 2037
- ✎ Opportunity for joint procurement of low-emissions technologies
- ✎ Facilitate business-focussed decarbonisation workshop series
 - A series was delivered in 2021 and June 2022
 - A new call for registration is already in place for Nov 2022
 - Murihiku Sustainable Tourism Programme, covers sustainable tourism indicators and decarbonisation

Net Zero Southland

4

Develop a reliable method of measuring new plantings and soil carbon, while aggregating the efforts of farmers in the region



Deliverables

Stimulate and accelerate emissions reduction in the farming and rural sector

Highlight existing programmes of tree planting being undertaken to enhance carbon sequestration in the rural sector

Development of a simple but effective method of identifying and measuring forestry, riparian and marginal land planting

Create advocacy for the collective efforts of farmers and landowners

2. Land



BEYOND 2025
SOUTHLAND

Regional Long Term Plan



“To prepare for and understand the implications of climate change on land in Southland Murihiku.”

Land



1

Focus on how we best support informed land-use decisions with better, and more accessible data and research

Deliverable



Facilitate the development of a carbon forestry report that identifies the impacts of large-scale carbon forest planting on the Southland economy, employment and community

Land



2

Support the development of spatial and climate change planning with a focus on ensuring a regional lens

Deliverable



Support councils and other stakeholders to ensure:

- Regional alignment of current efforts
- There is regional advocacy which aligns with our values as a region and people

3. Water



BEYOND 2025
SOUTHLAND

Regional Long Term Plan



“To prepare for and understand how to future-proof water and water assets to ensure the region can prosper”

Water



1

Supporting the work already happening around future proofing the region's water & water assets to ensure future economic prosperity

Deliverables



Support the investigation of creating resilient potable water supplies in Southland to support our main urban centres. This will also support large-scale processing industry needs and the needs of future new energy e.g. hydrogen.

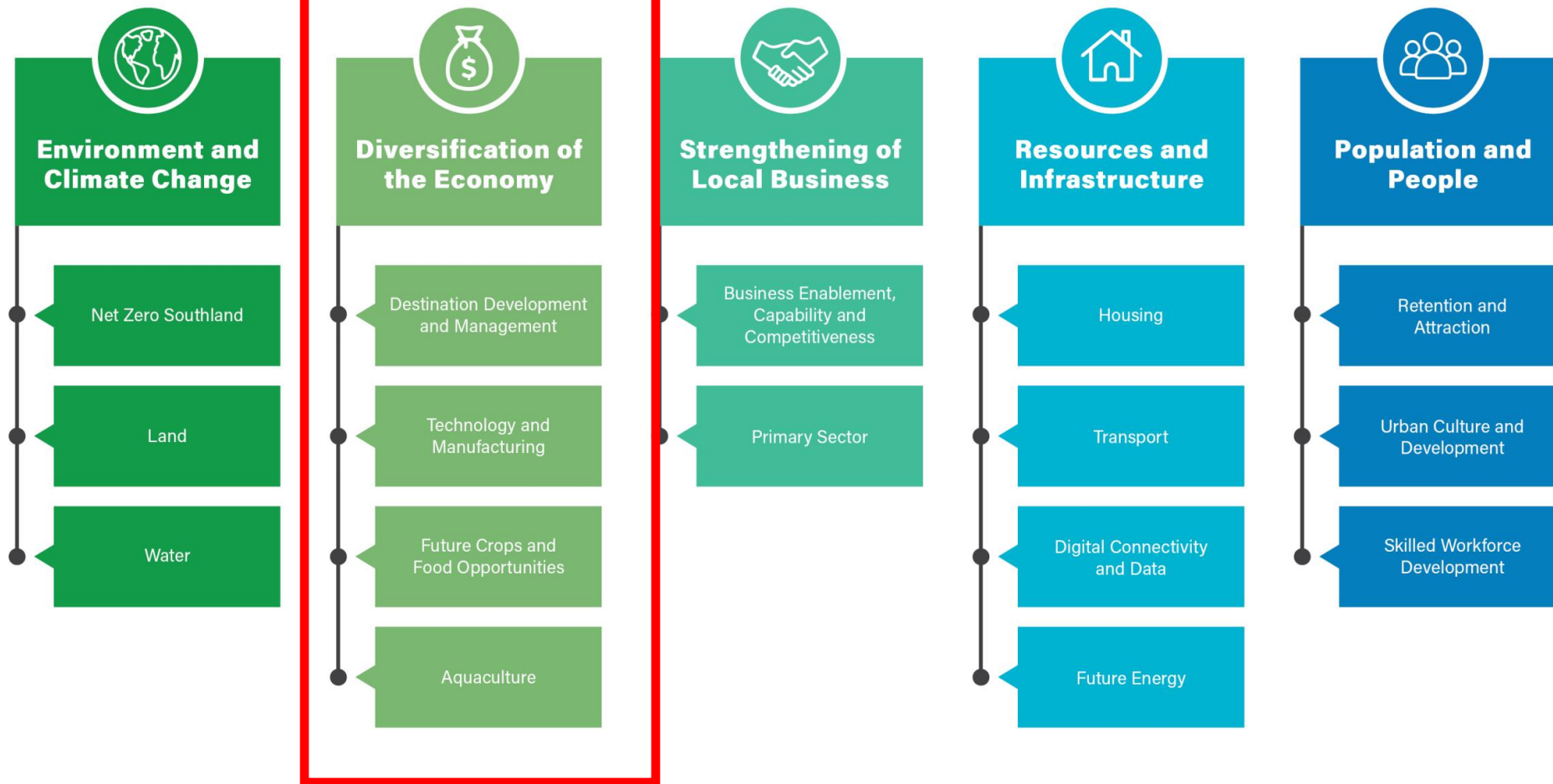


Model a deep shale formation known as the Chatton Formation with the aim to create a 3D model and validate it with aerial assessments SkyTEM.

Pillar 2: Diversification of our Economy



A more diverse region and economy means we are less exposed if one of our large employers or industries changes



4. Destination Development & Management (tourism)



BEYOND 2025
SOUTHLAND
Regional Long Term Plan



“To review and confirm the sustainable pathway for the Southland tourism sector to recover and achieve its potential as a key diversification opportunity”

Destination Development & Management

1

Confirm the pathway to recovery for the tourism sector

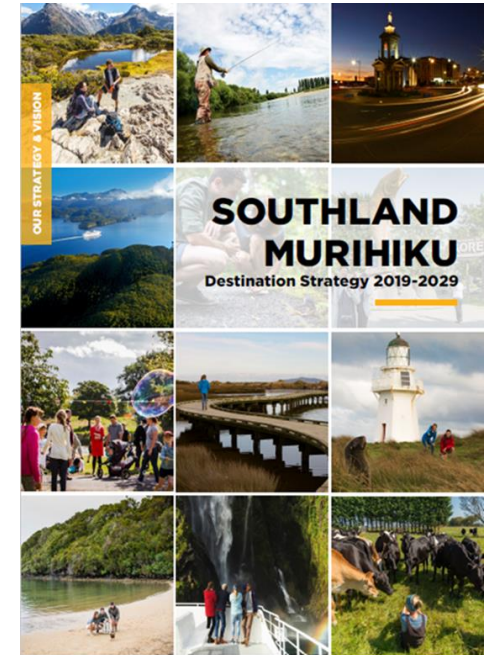
Deliverables



An updated Southland Murihiku Destination Strategy that details new tourism goals and aspirations and the pathway to achieving them.



A focus on understanding community sentiment towards this sector through research



Destination Development & Management

2

Ensure alignment of various projects, effort & investment to date in order to achieve maximum benefit

Deliverable



Clarity and understanding of how key projects align or are linked to shared goals as detailed in the Southland Murihiku Destination Strategy



5. Technology & Manufacturing



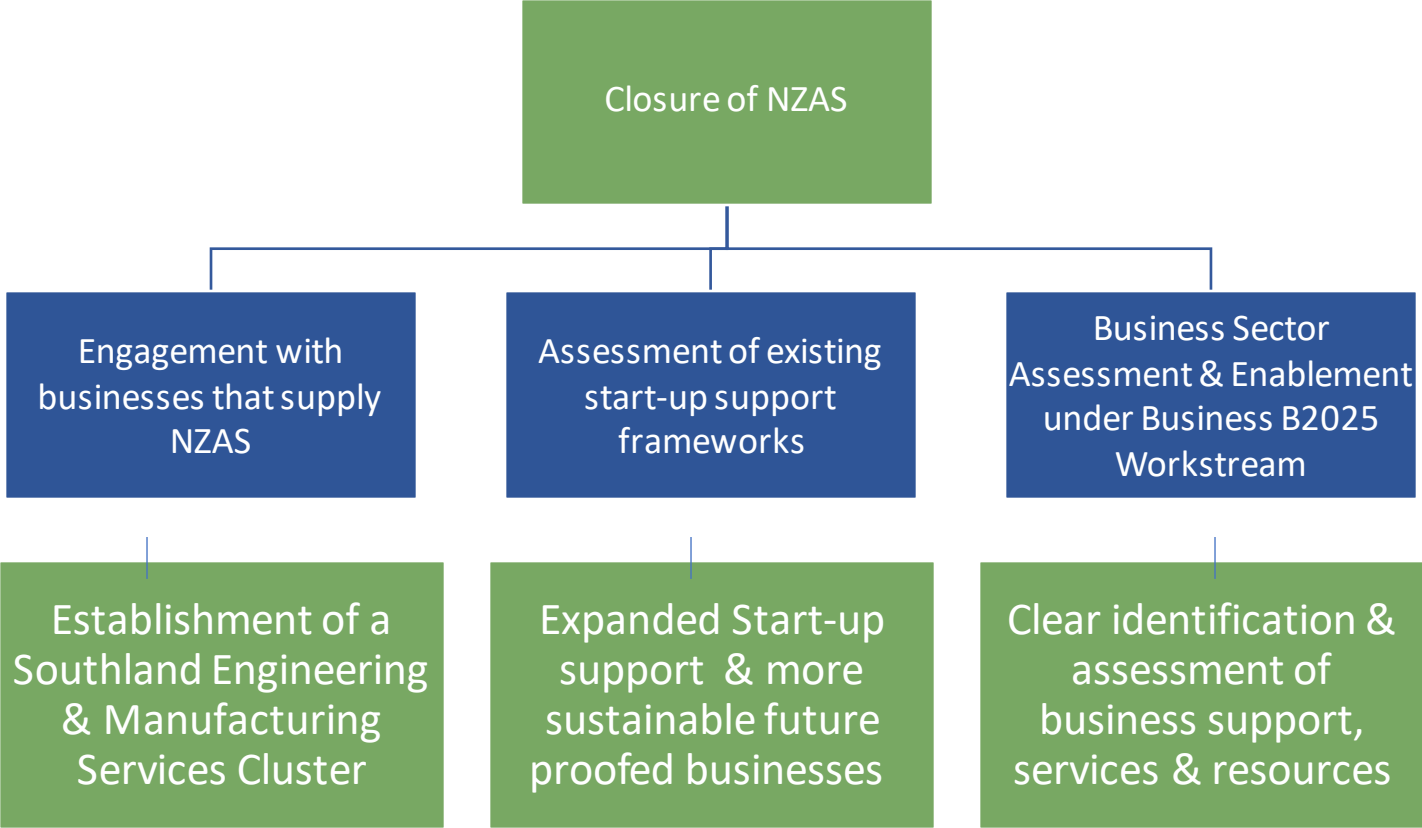
BEYOND 2025
SOUTHLAND
Regional Long Term Plan

“To identify opportunities, constraints and pathways forward to diversify and grow/expand technology based and manufacturing businesses in Southland Murihiku”

Technology & Manufacturing

1

Support the businesses most affected by NZAS' closure, to transition



2

Focus on technology-based diversification and innovation opportunities such as the space sector and data centres

Deliverables



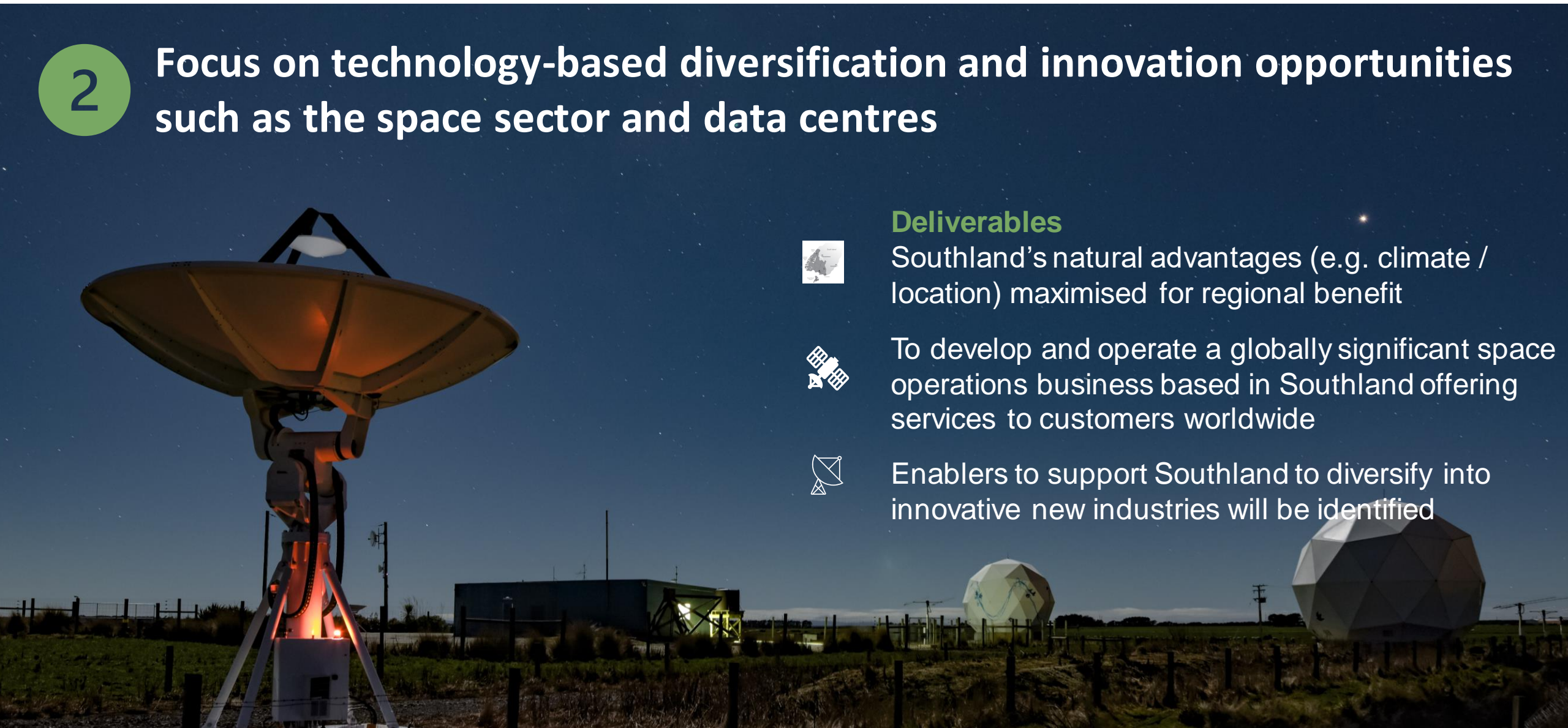
Southland's natural advantages (e.g. climate / location) maximised for regional benefit




To develop and operate a globally significant space operations business based in Southland offering services to customers worldwide



Enablers to support Southland to diversify into innovative new industries will be identified



6. Future Crops and Food Opportunities



“To develop the Southland future crops and food opportunity pathway considering how it can be a catalyst to drive land-use change, particularly where there is significant constraint affecting existing farm systems”

Future Crops and Food Opportunities

1

Conduct in-depth research into high-value food and fibre growth opportunities including a review of the Crops for Southland trial



Deliverables



Solution-based thinking to achieving net zero aspirations and consideration of climate change



Collaborative regional investment is enabled



Validated learnings to inform decision making are identified



Farmer & landowner-focused considering possible implementation



Future Crops and Food Opportunities

2

Build a model and invest in pilot facilities to enable the utilisation of green waste

Deliverables



The development of a model, secure supply chains and market opportunities for a range of products derived from green waste, such as biofuel



New species / land-use options for landowners



Increased regional resilience and enablement of new commercial green waste innovation and opportunities



Future Crops and Food Opportunities

3

Establish a Totara plantation forestry pilot in Southland and a framework for assessing its benefits

Deliverables



Knowledge gained on nursery, establishment, silviculture, harvesting and processing

Development of a commercial model for native species plantation forestry

New species/land-use option for farmers

Validation that Southland has a regional advantage in growing totara, due to our longer growing season and specific micro-climates.



Future Crops and Food Opportunities

4

Southland is a leader in low emission plant-based beverage manufacturing such as oat milk.



Deliverable



Support New Zealand Functional Foods to open NZ's first dedicated plant milk factory with 60 million litre p.a. capacity.

7. Aquaculture



BEYOND 2025
SOUTHLAND

Regional Long Term Plan

“Accelerate the development and scale of a sustainable and low emissions aquaculture industry that will drive productivity, create career pathways, diversify the Southland economy and deliver prosperity for the region and the country”



Aquaculture

1

Development of a Southland Aquaculture Strategy 2023 – 2043 by July 2023

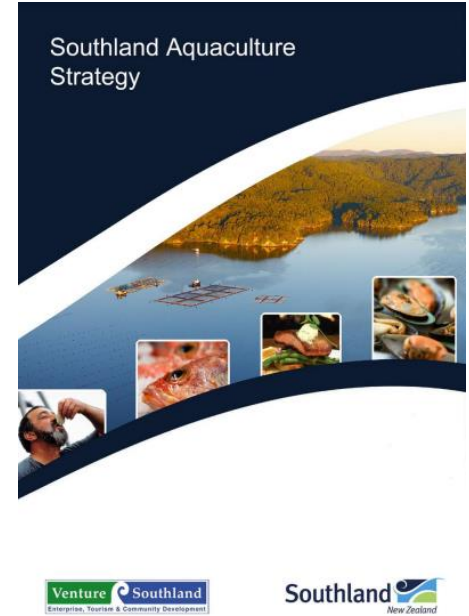
Deliverables



Maximising our competitive advantage with optimal growing conditions, good water quality, steady ocean currents, and low variance in temperature



Builds on the 2012 Southland Aquaculture Strategy



2

Alignment with the Southland Just Transition Aquaculture workstream and the Murihiku Aquaculture Group (includes Industry, business, Iwi, Crown)

Current focus: Open Ocean Aquaculture and Murihiku supply/value chain

Deliverables



Dependent on resource consent approvals for marine space.



Aquaculture Workforce Development Pilot – collaboration between Murihiku Aquaculture Group, Bluff Limited, Aquaculture New Zealand, Muka Tangata WDC, Te Pukenga (SIT)

Aquaculture



3

Development of the on-land Ocean Beach Aquaculture Park



Deliverables



Driven by Bluff Limited, Ocean Beach will become a growing Aquaculture Centre of Excellence and future Tourism & Hospitality Hub

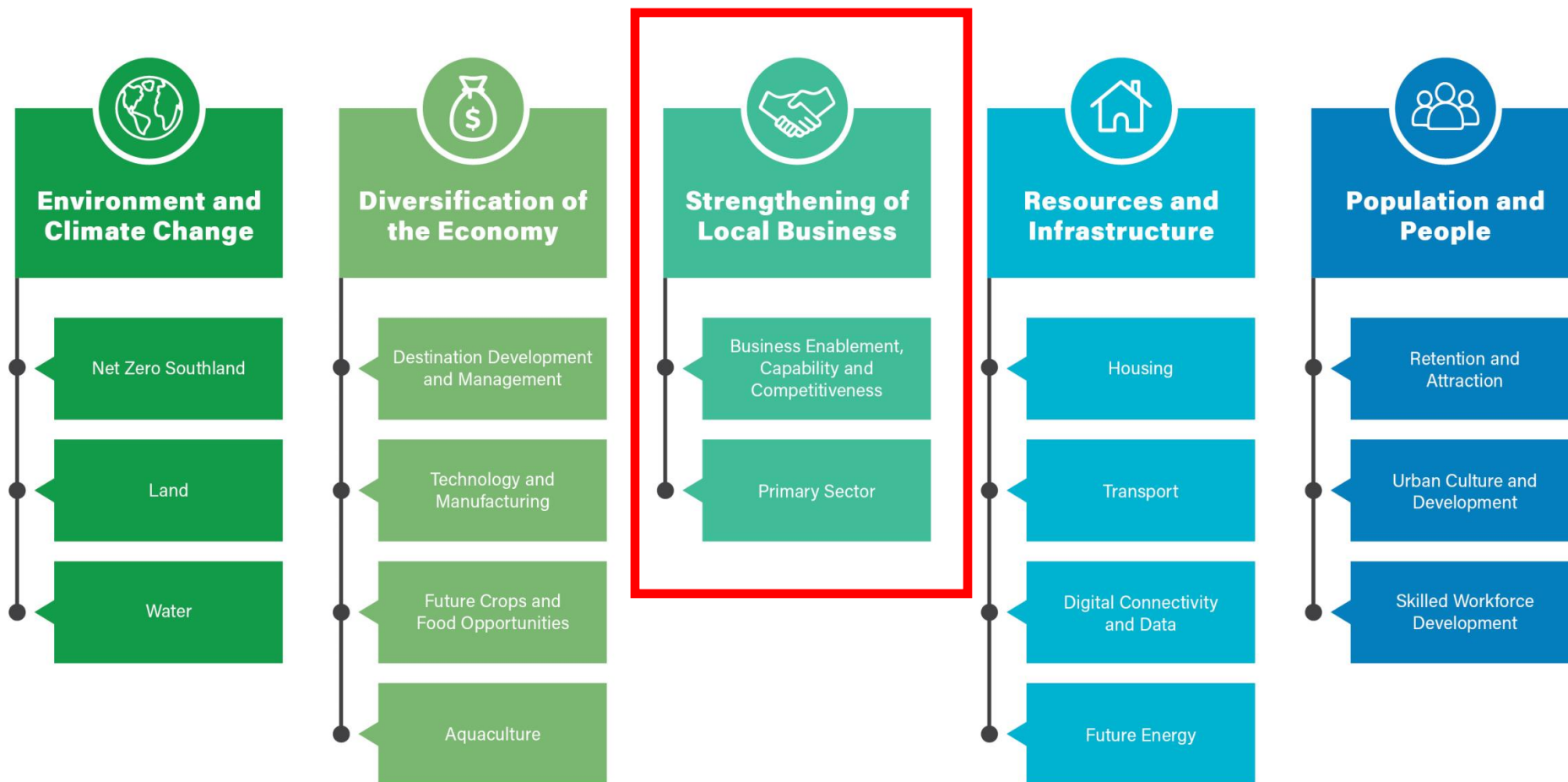


The project's current focus is site expansion & in operation, CH4 Global Asparagopsis EcoPark, Manāki whitebait, The New Zealand Abalone Company

Pillar 3: Strengthening of Local Business



The backbone of our region's economy is 14,000 businesses - mostly small in size and many owner operated. While we look to the future, we need to support and strengthen these existing businesses.



8. Business Enablement, Capability & Competitiveness



“To identify pathways and support networks for existing local businesses to be innovative, remain competitive and create capability - supporting the positioning of Southland as a globally competitive marketplace.”

Business Enablement, Capability & Competitiveness



1

Clearly define and understand the make-up of our business sector of 14,000 businesses and relevant challenges being faced (considering the impacts of COVID-19)

Deliverables



Create an updated snapshot of our business sector



Articulation of the current and future opportunities and needs of our businesses

Business Enablement, Capability & Competitiveness



2

Identify and aggregate current services and resources available to businesses, and assess gaps and opportunities

Deliverables




Stocktake of all services and resources is undertaken



Analysis of stocktake is undertaken to assess uptake of available services as well as gaps and opportunities

Business Enablement, Capability & Competitiveness



3

Southland produces 15% of NZ's tradable exports. Ensure Southland is globally competitive in a New Zealand setting.

Deliverable



Recommendations provided which support the continued development and promotion of Southland as a globally competitive marketplace including gaining an understanding of Southland's geographic positioning.

9. Primary Sector



BEYOND 2025
SOUTHLAND
Regional Long Term Plan



“To ensure that the primary sector and in particular agriculture, continues to be the driving force of the Southland economy and the backbone of the New Zealand economy.”

Primary Sector

1

Southland has 3,400 farms and 70% of our GDP is export focused (majority of this is linked to the primary sector)

A lot is going on in this sector. We want to make sure its coordinated and aligns to wider regional development and spatial planning

Deliverables



Ensure data is provided to ensure evidence-based decision making



Clarity of the roles and responsibilities of key players in the agricultural sector

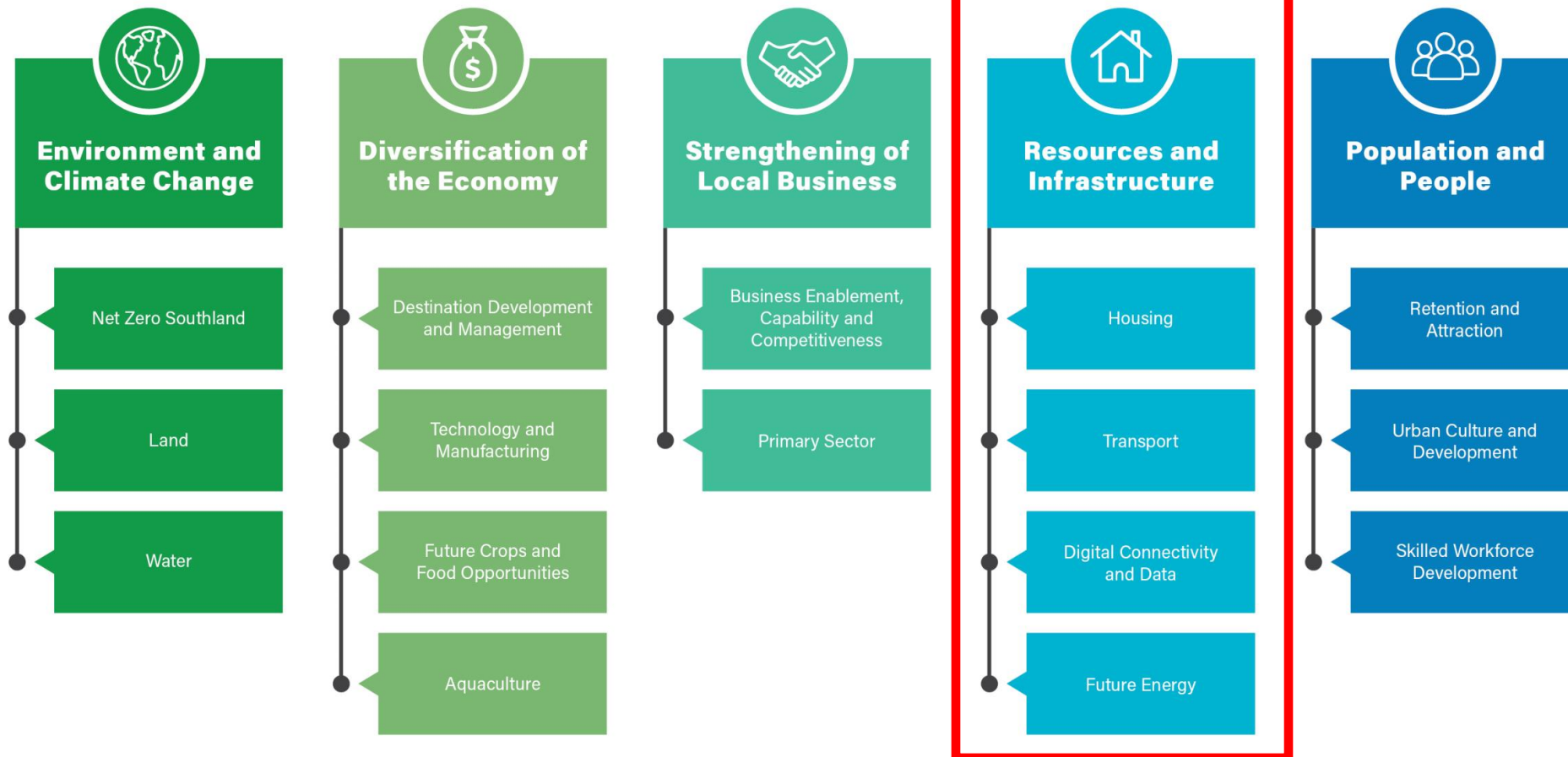


Identify and assess key issues currently being faced and possible implications for our region, including labour market shortages, carbon forestry, Emissions Trading Scheme, rising operational costs and compliance and land use.

Pillar 4: Resources and Infrastructure

An aerial photograph showing a coastal area with a large industrial facility in the foreground, a residential town in the middle ground, and a forested hill in the background. The industrial facility includes a large ship docked at a pier, several large storage tanks, and various industrial buildings. The town is densely packed with houses and commercial buildings. The hill in the background is covered in green trees.

Our region can only grow and thrive if the foundations on which it is built are fit for purpose and consider our changing population, demographics and future industry demand



10. Housing

BEYOND 2025
SOUTHLAND
Regional Long Term Plan



“Support and enable development of housing within the Southland Murihiku region”

Housing



1

Accurate insights and data is sourced and collated to support local & central government, mana whenua and the private sector to make informed evidence-based decisions.

Deliverables



The “Southland Murihiku Housing Needs Assessment” is produced, which provides a stocktake of housing supply as well as looks forward to future demand and sufficiency



There is a robust and inclusive approach and consultation process including overall facilitation by the Beyond 2025 Housing Working Group, led by Gore District Council Chief Executive Steve Parry



Priority housing projects are identified and supported where possible

Housing



2

There is a coordinated regional approach and innovative thinking applied to the issue of housing

Deliverables



Building on the Needs Assessment, a regional strategy is developed with recommendations on the future regional coordination of housing



Various stakeholder, council, private sector and mana whenua implementation approaches are acknowledged and included within the regional picture



There is clarity on roles and responsibilities relating to enabling the development of housing within the region



An innovative pilot opportunity is developed which reflects diversity of thought around what housing solutions for the future might look like

Housing



3

Focus on lowering our emissions by having warm and insulated homes which are also better for our people

Deliverables



Support the Southland Warm Homes Trust and others already working hard in this space (8,500 homes insulated to date)

Net Zero Southland goal of floor and ceiling insulation plus double glazing in 80% of existing residential homes by 2050

11. Transport



“To ensure the region’s transport system (road, rail, air and sea) enables and supports regional growth and wellbeing, while understanding and planning for new opportunities & challenges”

Transport



1

Improve transport efficiency and reduced emissions

Deliverables



Support local government to investigate road taxation and develop appropriate business cases to support investment in bridging, culvert replacements etc.



Partner with key infrastructure providers to ensure there is an integrated system and approach to ensure the movement of freight



Provide substitute fuel options for heavy transport, rail and shipping



Facilitate technical investigation and research associated with the \$5b Southern Green Hydrogen programme

12. Digital Connectivity and Data



BEYOND 2025
SOUTHLAND

Regional Long Term Plan



“To gain an understanding of the key issues and areas of the region that have underperforming connectivity and coverage and suggest pathways for improvement”

Digital Connectivity and Data

1

Building on the Southland Regional Digital Strategy (2015), ensure accurate insights and data is sourced and collated to support local & central government, mana whenua and the private sector to make informed evidence-based decisions

Deliverables



An assessment of connectivity is undertaken including mobile phone coverage and broadband

- PROGRESS UPDATE: Every square metre of Southland has low latency, high-capacity broadband coverage
- This assessment will be used as a key tool for advocacy and partnering with telecommunication providers



Support provided to establish data centres – Datagrid and T4.

13. Future Energy



“To understand the current and future demand & supply of energy in Southland Murihiku, considering both immediate and long-term challenges and opportunities.”

Future Energy

1

Development of Southland's fourth Regional Energy Strategy and associated research inputs



Partnership between Great South and Murihiku Regeneration

Deliverables



Will ensure Southland's needs are understood with a short, medium and long-term focus including the articulation of the relationship with our decarbonisation aspirations



Will be developed via an inclusive and objective methodology and process and inform the National Energy Strategy



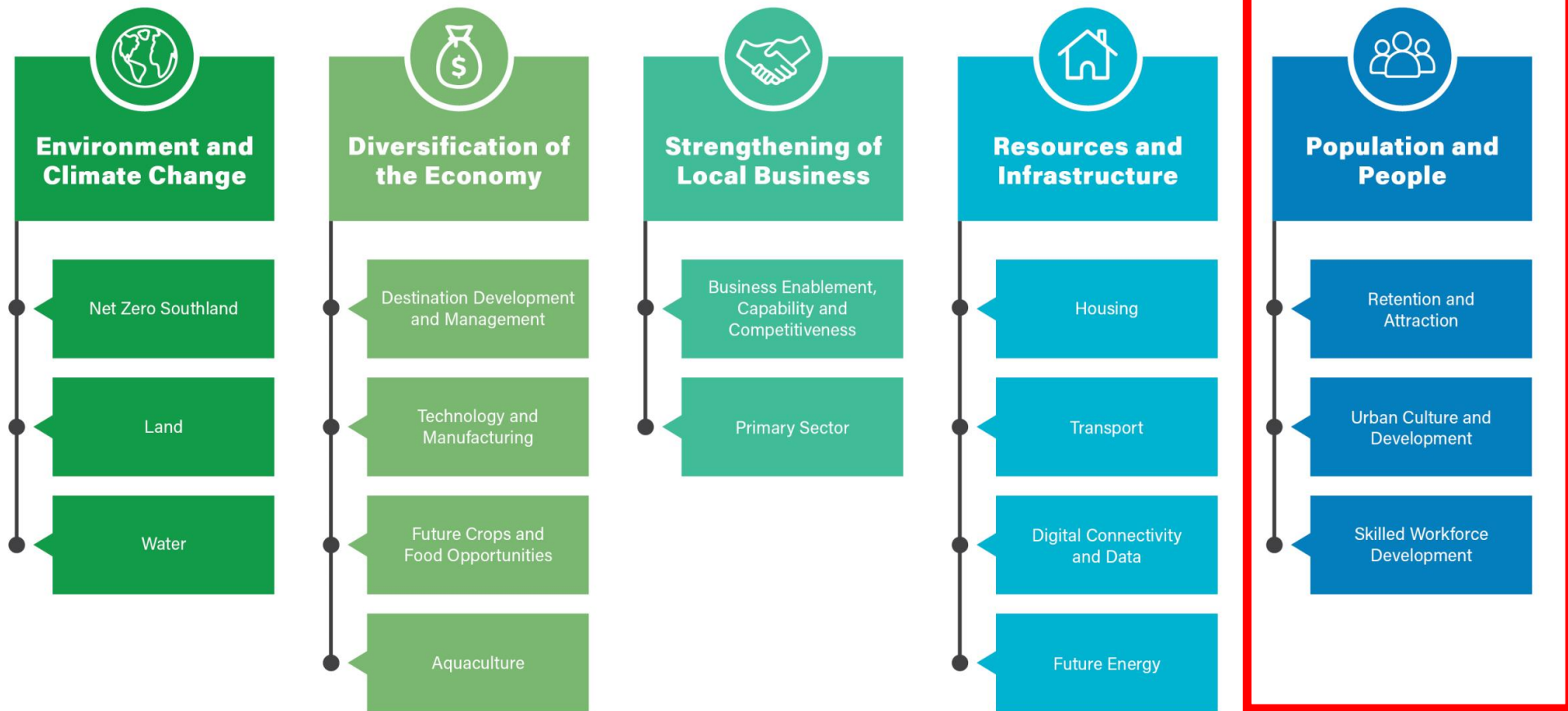
Key input research will be completed including:

- "Energy in the Landscape" – identifying hydro, wind & solar opportunities
- "Southland's Power Demand Projections" – new energy requirements for existing industry to decarbonise and new investment opportunities

Pillar 5: Population and People



At the heart of Murihiku Southland is our people. Continuing to support, develop and enhance the region as an attractive place to live, work and play is critical



14. Attraction and Retention



“To develop and promote Murihiku Southland as an attractive and vibrant place for people to live, work and play”

Attraction and Retention



1

Validate the anecdotal challenges and opportunities that Southland employers face in attracting and retaining employees in order to fill workforce and skills gaps

Deliverables



Facilitate an online survey to confirm and benchmark the challenges that Southland employers face



Delve deeper into the results of the survey through follow-up interviews and focus groups with businesses



Advocate for the right support and resource to really help our businesses

Attraction and Retention

2

Support businesses to retain new workers



Working with key employers, establish a pilot support programme for 6 months to help increase the engagement and retention of those who choose to relocate to Southland for employment



Increased capability of businesses to attract and retain workers



Provide insights, confirm anecdotal thinking and help identify priorities to inform a longer term, sustainable and targeted approach



Use the “Southland Story” to showcase the region as an attractive and vibrant place to live, work and play

Deliverables



Attraction and Retention

3

Use the 'place' of Southland as a key tool to attract and retain a skilled workforce

Deliverables



Develop the third stage of the “Southland Story” which will result in a toolkit suitable for use by businesses to support them to use the ‘region’ in their recruitment efforts.



Updated regional destination website www.southlandnz.com acknowledging its role as a key tool to attract people to live, invest, work, study and play.



Consideration of current ‘branding’ for the region

15. Urban Culture and Development



“To understand the interdependence of Southland’s rural and urban communities in order to ensure a prosperous and aligned Southland Murihiku region.”

Urban Culture and Development



1

Support each Council with their individual approaches and aspirations for their communities (as reflected in their LTPs)

Deliverables



Invercargill CBD rejuvenation



Our urban centres provide fit for purpose infrastructure for all of Southland where appropriate



A regional community picture made up of multiple council approaches

Urban Culture and Development



2

Ensure regional alignment of various community and social research and stocktakes which assess the needs of local communities and associated services

Deliverables



Aligned approach and effort



Insights into the social impact of Tiwai closing



Understanding of the pressures facing our communities alongside regional and economic aspirations

16. Skilled Workforce Development

A close-up, profile view of a man with a beard wearing a black baseball cap and a large, professional headset with a microphone. He is looking out of a window, and a blurred cityscape is visible in the background. The scene is dimly lit, suggesting an indoor setting like a control room or office.

“To ensure there is a joined-up approach to labour market planning which will see our workforce, education and immigration systems working together to better meet the differing workforce and skills needs in Murihiku Southland”

Skilled Workforce Development

1

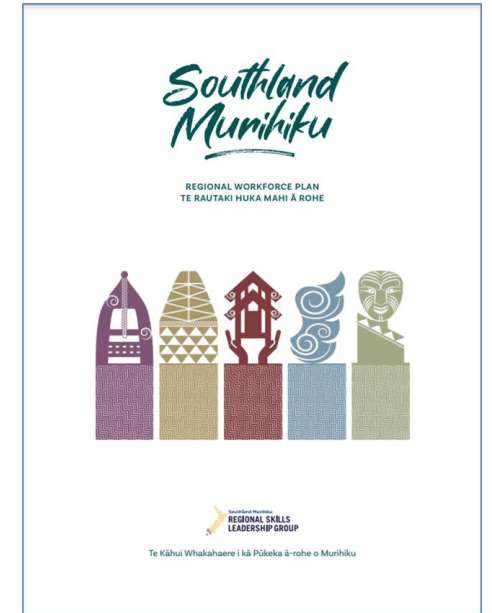
Existing and new industries and their skilled workforce needs will be identified and considered e.g. aquaculture

Deliverables



Partnership approach with the RSLG to implement the Southland Murihiku Regional Workforce Plan (RWP)

1. Support the Vocational Education, Training and Careers work group which looks at advising Govt on the delivery of training across the region
2. Research to better understand 'underutilised' workforce
3. Look at gaining insights on how to improve working conditions, with a focus on remote locations, seasonality and intermittent demand



Skilled Workforce Development



2

Focus on ensuring immigration policy enables recruitment of required workforce

Deliverables



Partnership with Immigration NZ to ensure there are opportunities for employers to be trained on the new immigration certification process



Ensure that the needs of our Southland businesses are fed into immigration processes and policy (through advocacy)

Skilled Workforce Development

3

Creating links between youth and employers to develop future careers in Southland



Deliverables



Delivery of the Southland Youth Futures programme

- Training businesses to be better employers of young people (currently 148 businesses – who employ 80% of regional workforce)
- Connections with all secondary schools - currently 2,300 youth involved (500 through Work Ready Passport). Around 8,000 youth involved in past 4 years
- Also connections with at-risk youth, teen parenting groups, employers and sector training organisations



Increasing interest in science, technology and engineering by creating opportunities for young people to participate in new industry activities such as space and engineering

We are progressing according to plan...



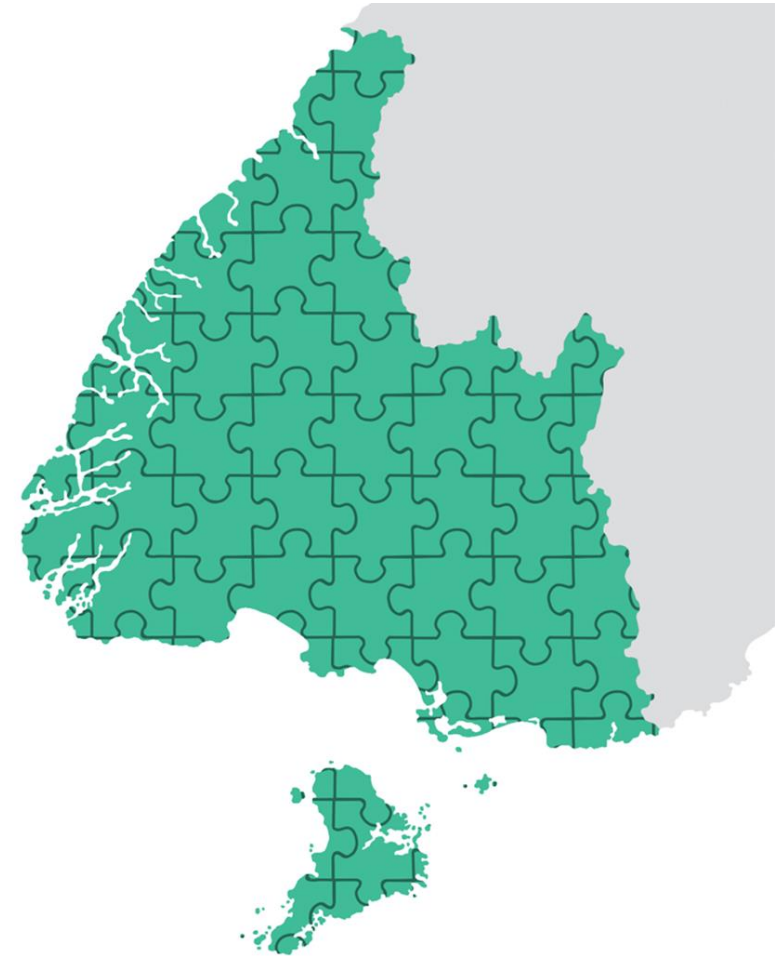
Structure set up and individual workstream activation underway

- 9 pieces of primary research underway (housing, energy, workforce, digital, tourism, net zero, business enablement, population/demographics)
- 5 working groups driving individual workstreams
- Consideration of wider happenings e.g. reform and legislation; other Just Transition workstreams' mahi



Significant stakeholder engagement and partnership, reflecting the desire that:

- Beyond 2025 is embedded in other planning
- There is no duplication of effort and resources
- It supports other work happening
- We articulate a clear regional voice and direction forward



For more information...



**Please contact Bobbi Brown or Nic Wills or visit:
beyond2025southland.nz**