



Nelson Tasman Regeneration Plan 2021 - 2031

2022 Update

Project
Kōkiri 2.0



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Introduction

Kei ngā tini maunga e tū ana i te ao, i te pō

Kei ngā rau awa e rere atu ki te au o Tangaroa

Kei ngā kāwai whakapapa, me ngā kāwai kōrero o te rohe nei

Tēnā Koutou

Tangihia ngā tini mate kei waenga i a tātou

Koutou kua huri ki tua, haere, haere, haere atu rā

Rātou ki a rātou, tātou ki a tātou

Tihei Mauri Ora

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The Nelson Tasman Regeneration Plan has been developed through a period of uncertainty and disruption. Its purpose is to support our region in navigating the next decade of change as we continue to rebuild from the COVID-19 pandemic and tackle the pressing challenges ahead.

The ripple effects of the COVID-19 pandemic continue to be felt throughout our community, affecting some worse than others. In many ways, the region's economy has fared better than expected through the pandemic and a lot has been achieved which we can all be proud of. But the pandemic has also shone a light on some structural weaknesses in our economy that can no longer be ignored. We have demonstrated our resilience and our ability to work together when it really counts. This plan is a collective call to action to do exactly that in tackling the challenges ahead.

Working together is more important now than ever. Our economic environment is changing fast and we need to be constantly front-footing the change required or risk being left behind. Further disruption to our lives and our economy is inevitable: we have a rapidly ageing population, we are facing biodiversity strain, increased frequency of extreme weather related events, climate change and global security challenges.

We also have some serious economic challenges to face in our current economy – our productivity is far below the national average, our average wage earnings are the second lowest in New Zealand and our housing affordability is the third worst in New Zealand.¹

Together, these forces create a compelling platform upon which to present this Regeneration Plan and collectively focus our efforts on the changes required to transform our economy. Business models and economic frameworks are rapidly evolving. And so must we.

Our task is not to restore the economy of yesterday but to rebuild a more resilient, regenerative, inclusive, and productive economy of the future. An economy that delivers for everyone and recognises our environmental limits and our part in global efforts to transition to a zero carbon circular economy.

¹(Patterson, Nelson Tasman Economic Briefing, March 2022) Nelson-Tasman Economic Briefing prepared for the NRDA by Benje Patterson, People and Places. March 2022

This plan has been developed under the auspices of the Project Kōkiri collaboration which was first brought together as an alliance of local leaders to support our economic response and recovery from COVID-19. This collaboration has delivered outcomes for Nelson Tasman that we can all be proud of. It has also strengthened the connections between agencies involved in delivering economic development for the region and ensured greater levels of alignment and collaboration across stakeholders. This plan ensures that we continue to work together in this way, to lock in the gains we have made and turn our attention to recovery and regeneration.

The Nelson Tasman Regeneration Plan is underpinned by the Te Tauihu Intergenerational Strategy² and the vision of Tūpuna Pono or Being Good Ancestors. It is informed by the Nelson Tasman Economic Briefing and for context

this Plan should be read in conjunction with the Economic Briefing.³ The Regeneration Plan speaks to a number of related and interconnected strategies such as the Nelson Tasman Workforce Development Plan⁴ and the Long Term Plans of both Nelson City⁵ and Tasman District⁶ Councils.

Despite our challenges, Nelson Tasman is well positioned to lead the charge on a more regenerative future. We have a proud history of creation and innovation. Care and protection for nature is part of our identity as a region. We are a desirable, liveable and dynamic place.

We know ourselves well, understand our strengths and are honest about our challenges. But our pioneering and innovative spirit gives us the strength we need to navigate our way into the future, together.

Kei a Tātou – We’ve Got This!



²Te Tauihu Intergenerational Strategy www.tetauihu.nz

³Nelson-Tasman Economic Briefing prepared for the NRDA by Benje Patterson, People and Places, March 2022

⁴Te Mahere Ohumahi ā-Rohe o Te Tauihu o Te Waka a Māui Nelson Tasman Regional Workforce Plan, Nelson-Tasman Regional Skills Leadership Group, 2022

⁵Your wellbeing, Nelson's future Oranga Tonutanga - Nelson's Long Term Plan 2021 - 2031, NCC, March 2022

⁶Tasman's 10-Year Plan 2021 – 2031, Tasman District Council Te Kaunihera o te tai o Aorere, 2021

A note on Nelson/Tasman

Project Kōkiri is one of many fora that connect both Nelson City Council and Tasman District Council and this plan reflects a region-wide perspective on economic development. Our two territories are inherently connected and share many of the same aspirations.

It is worth noting however that there is a big difference between our city and rural landscapes. Whilst we are connected as Nelson Tasman and as part of Te Taihū, we are also made up of a diverse range of settlements from Mohua Golden Bay to Motueka to Murchison and Nelson Lakes. Naturally, what we want from a smart little city such as Nelson is different from what we want for our rural settlements who have different needs and their own unique identities.

This plan aims to capture the best of both worlds – the things that bind us together and our shared aspirations. It does not seek to replace or override

the aspirations of our local settlements but rather to give us a shared platform from which to work. This is not new to any of us but it is important context to highlight as part of this plan.

We are also conscious that there is a continuing need to connect our planning more effectively across the whole of Te Taihū⁷, particularly in light of the Te Taihū Intergenerational Strategy and the clear desire to see a Te Taihū approach embedded in our planning, particularly from iwi of Te Taihū.

This plan is a product of the partners and stakeholders who are actively engaged in the Project Kōkiri collaboration and largely considers our challenges and opportunities through a Nelson Tasman lens. However it fully recognises the need to work together to find better ways of enacting partnership in Te Tiriti o Waitangi and reaching across to Wairau Marlborough to strengthen our region's connectivity.



Our Vision

Te Tauihu Intergenerational Strategy offered us the following vision, values and intergenerational outcomes.

The Vision

Tūpuna Pono – Being Good Ancestors

The Values

Whanaungatanga – We value relationships, we will work together & with tangata whenua

Pono – We are honest, open and accountable

Rangatiratanga – We are excellent in everything that we do

Auahatanga – We are innovative and passionate about what we do

Manaakitanga – We care and support one another

Mana Taurite – We are inclusive and strive for equity and equality

Ngā Taonga Tuku Iho – We honour and respect our taonga, our legacy

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The Intergenerational Outcomes

Te Taiao – The Natural World: Our relationship with the natural world is healthy

Pūtea – Economy: Our resilient economy allows our people, places, communities, and businesses to thrive.

Te Tauihutanga – Identity: Our people are proud of their individual and shared identity and feel a strong sense of belonging. We treat each other with kindness and respect.

Tangata – People & Communities: Our people and communities are welcome, healthy, and safe. Our people are connected across generations, cultures, and distance.

Te Rākau Taumatua – Place: Our people can access affordable and quality places to live. Our shared spaces are places where people want to be.

Papa Whenua – Infrastructure: Our people have resilient transport, communications and energy networks and water and waste systems.

Rangatiratanga – Leadership: Our decision-making is collaborative, courageous, inclusive, respectful and acts for the long term. We uphold the values and rights of the people and taonga of our region.

Mātauranga – Knowledge: Our people are knowledgeable, curious, and creative.

Our Plan at a Glance

Nelson Tasman is a place of palpable energy, vibrant culture, clever businesses and an array of stunning natural landscapes to explore. A place where it is easy to connect, and where connection breeds creativity and innovation. Our regenerative economy, built on intellectual capital, enables our people and places to thrive.

Missions	Economic Drivers , Opportunities and Challenges	Regional Themes	Priority Projects 2022
<p>Resilient A strong economy that can withstand and bounce back from shocks and disruptions.</p>	<p>Economic Drivers and Opportunities Blue Economy – 70% of New Zealand’s aquaculture is based here in Te Tau Ihu High-value Food, Beverage & Wellness - This sector is our largest contributor to GDP, fueled by innovation and favourable growing conditions. Horticultural Crops and Processing – This represents more than 4,000 jobs or 7% of all employment, compared to 2.5% nationally Forestry and Wood Processing – We produce approximately 10% of New Zealand’s sustainable roundwood forest supply. Liveability (Consumption Economy) – Driven by higher than average net migration to the region (96% vs 62% national average). Research, Science & Technology (Knowledge Economy) – We have the highest number of scientists per capita of any NZ city and a growing knowledge intensive workforce across our key sectors.</p>	<p>We are Intelligent Guardians Utilising research science and technology to achieve sustainable and regenerative economic development</p>	<p>Science and Technology Precinct Te Taihū Climatorium Nelson City Library Complex Development MissionZero: Businesses for Climate Action Regional Emissions Footprint Intelligent Guardians Identity Project Destination Management</p>
<p>Regenerative A low emissions economy that actively improves environmental wellbeing.</p>	<p>Visitor Economy – Tourism contributes to approx. 10% of GDP and employment in the region, the sector is driven by family-owned businesses. Knowledge Economy - Our intellectual capital that forms the value of so many of our businesses and allows us to sell knowledge to the world; high value-low impact economic activities Māori Economy - Our growing Māori economy, made up of both iwi and Māori owned enterprises, anticipated to grow substantially over the coming decade Green Economy - The part of the economy focused on sustainability and environmental restoration, and which includes our businesses who trade off a reputation for sustainability and care Digital Economy - The part of our economy enabled by remote working, and where our lifestyle proposition offers a unique competitive advantage as the digital economy continues to grow and develop Creative Economy – Our creative sector supports a range of careers and businesses in our region.</p>	<p>We are Makers and Creators Activating our identity and profile for arts and creativity</p>	<p>Nelson Arts and Creativity Strategy Te Āwhina Marae Redevelopment Screen Te Taihū Art/Work Creative Careers</p>
<p>Inclusive Economic success and prosperity that is shared by all, with no one left behind.</p>	<p>Economic Challenges: Low productivity – Productivity is the second lowest in NZ/22% lower than national average. Climate Change & Biodiversity Loss – Vulnerable to sea level rise & extreme weather events. Inequality and wages – Low average/mean incomes Workforce Supply – All our sectors are struggling to secure workers Housing affordability and access – The third worst housing affordability in the country Low Incomes - Average household income is 21% below the national average and average wage earnings are the second lowest in New Zealand Climate and Environment - We are facing serious challenges in grappling with climate change impacts and adaptation</p>	<p>We are a Blue Economy By realising the full potential of a clever and connected blue economy, we can drive simultaneous social, ecological and economic gains</p>	<p>Moananui - Te Taihū Blue Economy Cluster Port Taranaki Redevelopment PC3 Facility NeoSaxitoxin Cawthron Research Project Open Ocean Farming</p>
<p>Productive A smart economy that realises more value from the goods and services we provide.</p>	<p>Economic Challenges: Low productivity – Productivity is the second lowest in NZ/22% lower than national average. Climate Change & Biodiversity Loss – Vulnerable to sea level rise & extreme weather events. Inequality and wages – Low average/mean incomes Workforce Supply – All our sectors are struggling to secure workers Housing affordability and access – The third worst housing affordability in the country Low Incomes - Average household income is 21% below the national average and average wage earnings are the second lowest in New Zealand Climate and Environment - We are facing serious challenges in grappling with climate change impacts and adaptation</p>	<p>Enabling Infrastructure</p>	<p>Transport Waimea Dam Urban Regeneration Nelson Hospital Redevelopment Rural Connectivity</p>
<p>Productive A smart economy that realises more value from the goods and services we provide.</p>	<p>Economic Challenges: Low productivity – Productivity is the second lowest in NZ/22% lower than national average. Climate Change & Biodiversity Loss – Vulnerable to sea level rise & extreme weather events. Inequality and wages – Low average/mean incomes Workforce Supply – All our sectors are struggling to secure workers Housing affordability and access – The third worst housing affordability in the country Low Incomes - Average household income is 21% below the national average and average wage earnings are the second lowest in New Zealand Climate and Environment - We are facing serious challenges in grappling with climate change impacts and adaptation</p>	<p>Enabling Economic Development</p>	<p>Nelson Tasman Workforce Development Plan Regional Skills Hub Regional Identity Nelson Tasman Productivity Mahitahi 2.0 Innovation Hub</p>

Our Economic Context

Economy generated
\$5.5bn
of GDP in 2021

Our productivity sits at
22 % below the
national average



Closing the productivity
gap with New Zealand
could bring an extra
\$1.67bn
of GDP to the region

Our population is
112,600
as at 2021



Average wage earnings
are the second lowest in
New Zealand.

GDP per filled job is
\$96,800
\$124,800 NZ average



We have a high proportion
of small businesses

91 % have less than
10 employees



Inward migration
has driven
92 %
of our population
growth over recent
years



Intellectual Capital
We have the
highest number
of scientists per
capita of any
New Zealand city

Strong opportunity for growth:

Sectors with high regional competitive advantage



Blue Economy



Forestry



Horticulture



Science & Tech

Nelson Tasman Today

In seeking to develop a plan for the future of our economy, it is imperative that we understand what currently drives it, what changes and disruptions are likely to impact it, and the opportunities presented to us.

We are the people of Te Taihu. Together, we care for the health and wellbeing of our people and our places. We will leave our taonga in a better state than when it was placed in our care, for our children and the generations to come.

Te Taihu Intergenerational Strategy, 2020

Nelson Tasman is a sought after destination famous for its unique environment, sunny climate and favourable growing conditions. Our region has a rich history and interwoven story of migration from Tangata Whenua and European settlers through to the diverse communities of people who now call Nelson Tasman home. We are a truly multicultural society, with more than 40 ethnicities reported amongst our relatively small regional population.

Here in Nelson Tasman, the land and sea shapes our way of life and as a consequence, our regional economy. Our stunning natural landscapes draw visitors from all corners of the world, our favourable growing conditions mean we produce the most outstanding produce and the oceans that surround us provide some of New Zealand's most sought-after seafood.

Our economy and people are highly connected, throughout New Zealand and the rest of the world.

We're home to the geographical centre of New Zealand, lay claim to one of the country's busiest regional airports and are home to the largest fishing port in the country. We ship fresh produce, craft beverages, seafood and wood all around the world from our little slice of paradise.

Good things start here – Nelson Tasman is the birthplace and home of New Zealand's first and largest public-benefit science organisation, first centre for musical arts, first state-supported secondary school and first provincial museum. Even New Zealand's first game of rugby was played right here in Nelson Tasman.

Our innovative and pioneering spirit persists to this day. Our region is home to an array of high achievers and innovative businesses. Some were born here, others choose to move here because of the unique lifestyle offering. Our clever and creative people live here because Nelson Tasman gives them the space to explore, create and innovate.

Our Economic Drivers

Nelson Tasman has a strong base of longstanding anchor sectors of the economy that have underpinned our economic performance and prosperity for decades and aided our recovery from COVID-19.⁸

Agriculture, forestry and fishing are the biggest contributor to employment in Nelson-Tasman, closely followed by manufacturing. Within these high-level industry categories are three key production and processing foci – forestry, horticulture, and the oceans economy, all of which have expanded strongly over the past decade and have experienced resilient demand through the pandemic. These sectors are also well-aligned to longer-term structural shifts in global demand towards food and fibre products which can be produced with relatively more sustainable environmental footprints.

Other key industries of employment in Nelson Tasman include: health care and social assistance, construction, retail, professional services, accommodation and food services, and education. Many of these industries have benefited from population and visitor growth. Some of them are also key enablers that can improve the attractiveness of the region from a business and liveability perspective.⁹

Our core sectors are rich in potential and ripe for further development:

- **The Oceans Economy** – 70% of New Zealand’s aquaculture is based in Te Taihū¹⁰ and Nelson Tasman is home to Australasia’s largest fishing port¹¹. Nelson Tasman has more than 2,600 jobs in fishing, aquaculture, and processing, which represents 4.6% of employment, compared to 0.4% nationally. The region, together with neighbouring Marlborough, is the part of New

Zealand with the highest share of employment dedicated to food production from the ocean.¹²

- **Food, Beverage & Wellness Products** – Favourable growing conditions supporting this sector as our largest contributor to employment. We are a significant horticultural region, not just for primary produce but with an extended value chain delivering a range of high-value food and beverage products. Local Plant and Food Research assets and capabilities, a Food Lab, and a burgeoning cluster of companies/processors exploring nutrition opportunities all support the strong platform we have to build from.
- **Horticultural crops and processing** them into high-value products represented more than 4,000 jobs in Nelson Tasman in 2021, which was 7.0% of all employment, compared to 2.5% nationally. A horticultural focus aligns to a trend of ethical consumerism.¹³
- **Forestry & Wood Processing** – About 5.0% of New Zealand’s plantation forests are in Nelson-Tasman, with a similar amount in Marlborough. The region has New Zealand’s highest concentration of specialist processing, particularly in laminated and structural wood products.¹⁴ Nelson Tasman is home to one of the largest MDF plants in the world and produces approximately 10% of New Zealand’s sustainable roundwood harvest.¹⁵ This sector accounts for more than 2,000 jobs in Nelson Tasman, or 3.5% of employment (compared to a 1.3% share nationally).

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⁸The Nelson Tasman Regional Economic Development Briefing, Project Kōkiri, January 2021 www.projectkokiri.nz

⁹Extract text: Nelson-Tasman Economic Briefing prepared for the NRDA by Benje Patterson, People and Places, February 2022.

¹⁰Source: Aquaculture New Zealand.

¹¹Source: Port Nelson.

¹²Extract text: Nelson-Tasman Economic Briefing prepared for the NRDA by Benje Patterson, People and Places, February 2022.

¹³Extract text: Nelson-Tasman Economic Briefing prepared for the NRDA by Benje Patterson, People and Places, February 2022.

¹⁴Extract text: Nelson-Tasman Economic Briefing prepared for the NRDA by Benje Patterson, People and Places, February 2022.

¹⁵Source: www.figure.co.nz.

- **Liveability & Our Consumption Economy and Lifestyle** – A “catch all” economic driver partially driven by our high net migration as a factor of population growth (92% over the last three years).¹⁶ The COVID-19 pandemic has placed an increased focus on lifestyle, which favours regions such as Nelson Tasman where migration has driven the vast majority of population growth over recent years.

Many of the same factors that attract visitors to the region, also attract migrants. Nelson Tasman has a diversity of peoples not usually seen outside the main centres of New Zealand. The Multicultural Economy is difficult to measure, but we recognise how our cities can become vibrant and colourful multicultural centres that attract visitors, where newcomers feel at home, producing and consuming the products they grew up with, where the ethnic food hospitality sector (that was greatly weakened by COVID-19) can boost and expand.

- **Research, Science & Technology** – One of our growing strengths with a proud history of innovation and the highest number of scientists per capita of any New Zealand city¹⁷. Nelson Tasman is home to New Zealand’s largest independent research establishment, the Cawthron Institute, as well as a Plant and Food Research facility. We have a strong relationship between our science and technical establishments and the food, beverage and wellness products sector, especially in seafood, aquaculture and extending into algae, seaweed products and beyond: recent developments in extracts are progressing into medical products.

Our technology providers are a strong part of our innovation ecosystem, supporting the development of regenerative and value adding solutions throughout our industry sectors, and breaking new ground in big data and AI to facilitate major developments such as open oceans aquaculture. There are also strong connections between our digital technologists and our creative community, lending impetus to how we adapt to a changing world.

- **The Visitor Economy** – Nelson Tasman has a long history of attracting both international and domestic visitation. Around 7.7% of jobs in Nelson Tasman were supported by visitation in 2021, compared to 5.6% nationally.¹⁸ There are opportunities for the visitor economy to strengthen its linkages to other sectors and act as a ‘shop front’ and a conduit for worker attraction and retention.. Visitation can connect visitors to consuming the region’s other key products (e.g. food and beverage) when they return home.

Although the pandemic has caused challenges for some visitor sector operators in Nelson-Tasman, the sector has fared better than what has been experienced nationally by the tourism sector. A key factor behind the Nelson Tasman visitor sector’s relative resilience has been the higher share of domestic visitation. Before COVID-19, (year to March 2020) domestic visitor spending accounted for 66% of all visitor spending in Nelson-Tasman, with international visitor spending accounting for 34% of spending. By comparison, domestic visitors accounted for a 59% share of pre-COVID-19 spending in the visitor sector nationally.¹⁹

¹⁶Source: Nelson Tasman Regional Economic Briefing prepared for the NRDA by Benje Patterson, People and Places, February 2022.

¹⁷Source: Infometrics Employment Data Bank 2021.

¹⁸Extract text: Nelson-Tasman Economic Briefing prepared for the NRDA by Benje Patterson, People and Places, February 2022.

¹⁹MBIE Monthly Regional Tourism Estimates October 2020 release.

Our Opportunities

We have a once in a lifetime opportunity to deliver meaningful change in and for our communities.

Te Taihu Intergenerational Strategy, 2020

Cutting across our industry sectors are concentrated economic groupings which present opportunities for expansion and development when we converge our key strengths and the direction of travel globally within the economy. These include:

- **The Knowledge Economy** - Our intellectual capital that forms the value of so many of our businesses and allows us to sell knowledge to the world; high-value/low-impact economic activities
- **The Māori Economy** - Our growing Māori economy, made up of both iwi and Māori owned enterprises, anticipated to grow substantially over the coming decade
- **The Green Economy** - The part of the economy focused on sustainability and environmental restoration, and which includes our businesses who trade off a reputation for sustainability and care
- **The Digital Economy** - The part of our economy enabled by remote working, and where our lifestyle proposition offers a unique competitive advantage as the digital economy continues to grow and develop
- **The Creative Economy** - From artists and artisans to graphic designers and writers, supporting a range of careers and businesses in our region. We acknowledge the contribution made by the many and varied ethnic communities who make up our multicultural society. We have creative artisans, retailers, food producers who have started their businesses or are waiting for their opportunity to contribute.

These concentrated economic drivers map well to our core economic strengths. For example, we are already well known for our success in aquaculture, but the green and knowledge economies both present opportunities for us to realise further value from this industry without increasing our footprint. This is an example of where our regenerative economic strategy helps us play to our strengths and unlock the hidden potential that exists in the region in a way that enhances outcomes for our environment and our people.

Likewise, as we look at opportunities to attract residents who bring their own job with them and work remotely in the digital economy: whilst we must ensure we are keeping up with infrastructure demands, this provides opportunities to bring more external cashflow into our economy which supports our hospitality and retail sectors. In addition, being able to tap into global opportunities for work will provide more favourable conditions to retain young people in the region, particularly under current conditions with COVID-19.

There are encouraging signs that our region is poised for significant development in research, science and technology. Our innovation ecosystem is expanding²⁰, and more clever businesses are emerging, providing employment opportunities and supporting our key economic drivers to realise higher value and build resilience to global changes. The proposed Science and Technology Precinct in Nelson City offers a platform from which we can further develop and attract more companies in this space, supporting the development of higher value industries and creating more high-paying jobs.

²⁰NRDA CoStarters programmes, the Te Taihu Māori Business Network, and the Tourism Transition Programme are all recent expansions to the Innovation Ecosystem.

Advances in automation through technologies such as Artificial Intelligence (AI) will transform some of our key sectors.²¹ Our primary sector is likely to be an early mover in this wave of change, with opportunities to reduce waste, automate physical processes and optimise performance across the value chain.

Just as businesses grow through increased sales, our region expands through increased trade. More than a quarter of the world’s economic output comes from the global flow of goods, services and capital.²² Our economy is no exception²³ and our reliance on exports requires us to be extremely competitive in global markets and adaptable to changing conditions.

A significant amount of our economic growth has been driven by migration into Nelson Tasman, which has boosted the consumption sector.²⁴ We have a unique opportunity to focus our efforts on “growing from within”, to play to existing strengths, to correct some of the structural imbalances in our economy, and to tap into unrealised potential of our key economic drivers.

We have an opportunity to coalesce behind a vision for a more prosperous, equitable and resilient economy. Our rewards will come in the form of sustainable economic development that leads to more productive industries, new products and services, more business formations and expansions, and new businesses relocating to the region to take part in our rich ecosystem of development and innovation.

We have made significant progress:

- The **Te Taihu Intergenerational Strategy** was a landmark piece of work which shifted the regional conversation to an emphasis on wellbeing. The strategy set out the vision of ‘Tūpuna Pono’ or

Being Good Ancestors and embodied Oranga Te Taihu, our own wellbeing framework for the region.

- The **Project Kōkiri** recovery programme²⁵ delivered unprecedented levels of support to businesses and the region to stimulate cashflow and secure jobs against the headwinds of the pandemic.
- In response to the economic impacts of the COVID-19 pandemic, both councils brought forward significant capital and **infrastructure projects** to stimulate investment in the region.
- There are a number of exciting **game-changing developments** on the horizon that have been foreshadowed by our network of innovative organisations and institutions who are all committed to the goals of realising a more resilient, regenerative, inclusive, and productive economy for Nelson Tasman.
- Even since the first draft of this Nelson Tasman Regeneration Plan was written, a number of **priority projects and actions have progressed** and begun having an impact, such as the funding commitment for the Nelson Hospital Redevelopment, planning for the Science and Technology Precinct, *Moananui* (blue economy cluster), Art/Work programme, the Regional Identity project, the Business Insights Panel and the Workforce Development Plan to name a few.

We have designed this plan to have a portfolio of mutually reinforcing initiatives that enhance the productivity of our region whilst delivering on our regenerative economic direction and supporting better outcomes when it comes to sustainability, resilience and inclusion.

²¹Artificial Intelligence Shaping a Future New Zealand, AI Forum New Zealand 2018.

²²Key Statistics and Trends in International Trade 2020, United Nations Conference in Trade and Development UNCTAD, 2021.

²³Nelson Tasman Annual Economic Profile 2021, exports share of GDP 24% in 2020.

²⁴Infometrics Annual Economic Profile 2020; NRDA Sector Analysis (unpublished) October 2020.

²⁵Project Kōkiri Nelson Tasman Economic Response & Regeneration Action Plan, Project Kōkiri, June 2020

Our Challenges

Whilst our challenges are significant, the people of Te Taihu have the knowledge and courage to navigate these choppy waters together.

Te Taihu Intergenerational Strategy, 2020

A Snapshot of Challenges

Challenge	Issues	Local Impact
Global Challenges	<ul style="list-style-type: none"> • Climate change • Inequality and global poverty • Exhaustion of non-renewable resources 	<ul style="list-style-type: none"> • Nelson Tasman is vulnerable to sea level rise. • Nelson Tasman has significant material hardship and child poverty. • Nelson Tasman is reliant on natural resources for our economic prosperity.
New Zealand Challenges	<ul style="list-style-type: none"> • Low productivity • Low wages • Skills shortages • A lack of diversification • Under-investment in infrastructure • A rapidly ageing population • Housing affordability and access • Shallow domestic capital markets • Biodiversity decline 	<ul style="list-style-type: none"> • We suffer from the second worst productivity in the country. • We have low average incomes and are underpinned by low wage sectors. • We have a number of skills shortages and seasonal labour challenges. • We are an export driven economy, vulnerable to global conditions. • We have a relatively low and ageing population base with significant growing pressures which makes it difficult to fund infrastructure. • We are on track to have the fastest growing ageing population in the country and our working age population is declining, in contrast to the national trend. • We have the second (Tasman) and third (Nelson) worst housing affordability in the country with a lag in supply that we have been carrying for over a decade. • Our capital flow tends to favour real estate over commercial or innovation opportunities. • Changes in land and sea use, climate change, pollution and invasive species are putting pressure on Te Taiao²⁶.
Regional Challenges	<ul style="list-style-type: none"> • Distance • Scale • High % small businesses • Perception 	<ul style="list-style-type: none"> • We are still facing significant disruption as a result of COVID-19 including supply chain and labour market issues. • We are heavily reliant on our port and airport, with a relatively small “surrounding” population within driving distance. • We are a small region spread across a large geographical area which makes infrastructure challenging to fund and deliver. • Our SMEs struggle to invest in change and development • We are often seen as a ‘high-decile’ region without major issues, and consistently fail to attract public sector investment. Our low wages hinder the attraction of talent.

²⁶Biodiversity in Aotearoa 2020, Department of Conservation Te Papa Atawhai

Nelson Tasman has some serious challenges. Some of them are new – the COVID-19 pandemic has disrupted our economy in unprecedented ways and devastated the visitor sector. Other challenges include a number of wicked problems that the region has been grappling with for some time.

Low Productivity

The region has stubbornly low productivity compared to even the national average²⁷, across all industries – not just those with nationally lower productivity. Our productivity gap is so significant that if we were to improve to the national average, it would take an estimated 145 years to do so on our current trajectory!²⁸

Workforce Supply

Many of our sectors are struggling to secure workers and the war of talent is becoming more competitive. We have traditionally low unemployment and there are concerns of further brain drain as New Zealand borders open up to the world. Labour shortages have had tangible impacts on local businesses from retail and hospitality through to our primary industries. Our labour market is highly reliant on inward migration.²⁹ Horticulture and tourism have highly seasonal workforce needs and shortages have been exacerbated by a reliance on migration amid border closures. The labour strain can be seen and felt across our economy.

Housing

Our housing crisis has worsened through the course of the pandemic and house prices rose rapidly,³⁰ now followed by interest rate rises and inflation. Accessing housing of all types in the region continues to be a challenge, whether renting or buying. Many young New Zealanders still feel locked out of the housing market and higher-than-average portions of our household incomes are supporting mortgages and rents.³¹

Poor housing affordability and availability in Nelson Tasman affects our ability to attract and retain talent and investment. Resource management reform and policy and regulatory support are required to support councils to enable intensification. The ongoing conversion of greenfield sites for new housing cannot be our only solution.

Years of underinvestment in social housing will take time to address, but funding and new frameworks will help pilot new housing types and ownership models.

Low Incomes

In addition to the housing stressors, our incomes are lower than the national average and have failed to keep up with the cost of living. Average household earnings in Nelson Tasman sit at 21% below the national average and our average wage earnings are the second lowest in New Zealand.³²

Climate and Environment

Along with other parts of the country, we are facing serious environmental challenges in biodiversity collapse and grappling with the impacts of climate change.³³

²⁷Nelson-Tasman Economic Briefing prepared for the NRDA by Benje Patterson, People and Places, March 2022

²⁸(Understanding Productivity in Nelson-Tasman, prepared for the NRDA by Benje Patterson, People and Places, December 2021, 2021)

²⁹(Nelson Tasman Draft Workforce Development Plan, 2022)

³⁰Quotable Value House Price Index <https://www.qv.co.nz/price-index/>

³¹Nelson Tasman Regional Economic Profile, Infometrics, 2022

³²Nelson-Tasman Economic Briefing prepared for the NRDA by Benje Patterson, People and Places, March 2022

³³(Te Tauīhu Intergenerational Strategy, 2020)



The Changing World

In the global setting, new economic and business models are emerging. The economic context is being reimagined, driven by a social and strategic reset and further fueled by a number of significant shifts occurring across the world.

These include moves:

- From a linear economy to a circular approach
- From fixed working environments to flexible work
- From digital as a sector to digital as the norm
- From a GDP wealth focus to a wider economic wellbeing focus

In the Aotearoa New Zealand context, we are seeing a big reform pipeline that is restructuring critical sectors such as vocational education, health and water infrastructure. Perhaps even more significant still is the reform of the Resource Management Act and the Future of Local Government Review which will guide local governance arrangements moving forward, something that could have far reaching implications for our region.



Spotlight On – Māori Economic Development

As businesses, iwi, communities and local and central government organisations, it's time to collaborate better in Te Taihū and as sectors across Aotearoa. It is also an opportunity for us to take stock of our business models and evaluate whether they remain fit-for-purpose.

Te Taihū Intergenerational Strategy, 2020

A strong Māori economy supports our regional economy and benefits everyone. We consider the Te Taihū Māori economy as including iwi-owned and other Māori authority-owned enterprises and Māori-owned businesses, including self-employed Māori in the region. We recognise from the outset that whilst this plan focuses on 'Nelson Tasman', these boundaries are not necessarily recognised by iwi of Te Taihū. Therefore, it is imperative when considering Māori economic development, that we look through it with a Te Taihū lens and include Wairau (Marlborough) as part of our thinking and approach.

This plan recognises that whilst the leadership and direction-setting of the Māori economy here must always come from Ngā Iwi o Te Taihū, the agencies that form the Project Kōkiri collective must be active in supporting and championing Māori economic development efforts.

On a national level, we understand Māori businesses face a number of challenges, including but not limited to accessing people with the necessary skills to operate in accordance with Te Ao Māori values and tikanga, establishment of an online presence, accessing and securing investment and capital for growth and, particularly for iwi and other Māori authority-owned enterprises, balancing the long-term growth of assets for future generations with the need to grow income and returns while also delivering social benefits in areas such as housing and hauora (health and wellbeing).

Te Taihū has a thriving Māori economy on the brink of a new wave of development and innovation as iwi and other Māori authorities develop and grow their asset bases. We recognise the need for a specific focus on Māori economic development and that there is substantial development potential in a targeted focus on Māori owned enterprises and Māori entrepreneurs in the region. This proposition is further enhanced by the opportunities being presented by the Government's recent policy³⁴ which mandated government agencies to ensure that at least 5% of the total number of annual procurement contracts are awarded to Māori businesses.

Underpinning the thinking behind a focus on Māori economic development is recognition that Māori are some of the most affected by income disparities, unemployment and household debt. That inequality has continued to perpetuate even during periods of economic growth for New Zealand. We also know that Māori economic development must not be considered in isolation from environmental, social and cultural wellbeing.

The COVID-19 period was a significant time for the eight iwi of Te Taihū as they banded together under the Kia Kotahi te Hoe recovery plan which led to the creation of the Te Kotahi o Te Taihū Charitable Trust. The Trust is focused on creating the best conditions for whānau to thrive in Te Taihū and is expanding on the work underway to collaborate as iwi, hapū and marae, along with central and local

³⁴<https://www.procurement.govt.nz/about-us/news/supplier-diversity-to-increase-through-new-procurement-targets-for-maori-businesses/>

government, to feed and house whānau in need, improve wellness and ensure there are opportunities for training and meaningful work. The other recent significant development is the formalisation of the Te Taihū Māori Business Network Toiere and the work they are doing across Te Taihū to advance Māori enterprise and opportunities.

There are significant economic and social benefits that will arise from proposed marae redevelopments in the area. These redevelopments not only provide new employment opportunities and economic stimulus but also opportunities for

increased visitation and use of these facilities and in some cases, the development of tourism and educational opportunities.

In accordance with our understanding of trends and needs in this space, we expect that the uptake of businesses accessing Te Reo and Tikanga expertise to upskill and educate staff on Te Ao Māori will rapidly increase during the course of this plan. The revival of Te Reo Māori in the region was affirmed recently at the second Te Kaiāotanga o te Reo Symposium in Whakatū attended by over 700 people.



Spotlight On – Climate Change

The Natural World, is struggling under increasing pressure and our society isn't meeting the needs of our most vulnerable.

Te Tauihu Intergenerational Strategy, 2020

The impact of climate change presents the biggest challenge of our time. Despite the urgency for climate change action, our emissions have continued to rise. It is incumbent upon us to be bold and to transition to a zero carbon circular economy, and to respond rapidly to the climate emergency through mitigation and adaptation actions.

New Zealand now has a legislative framework that charts our course to a zero emissions economy by 2050³⁵. Our transition to electric vehicles is advancing with incentives and policy being introduced to encourage the switch.³⁶

The significance of the challenge cannot be underestimated nor can the cost of inaction.

At a regional level, there is a grassroots movement for climate action with groups such as the Nelson Tasman Climate Forum and Businesses for Climate Action. These groups acknowledge the importance of reframing our economic development approach to ensure that all investment and policy in this space is supporting carbon reduction and adaptation to climate change.

MissionZero,³⁷ a campaign platform born out of the Businesses for Climate Action group, is an opportunity for the region's businesses to lead from the front when it comes to climate action. The group was founded by local business and community leaders, is now established as a not-for-profit trust and is actively coaching and connecting businesses on their carbon reduction journeys. This type of initiative exemplifies the approach that is required to tackle our carbon footprint – proactive and enabling.

Whilst the case for change and the cost of inaction are clear, the economic advantages and opportunities of climate change mitigation and adaptation are worthy of consideration in this plan.

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³⁵Te mahere urutanga ā-motu (tuhinga hukihuki) Draft national adaptation plan, Ministry for the Environment Manatū Mō Te Taiao, 2022

³⁶Waka Kōtahi NZ Transport Agency, Clean Car Discount <https://www.nzta.govt.nz/vehicles/clean-car-programme/clean-car-discount>

³⁷<https://missionzero.nz/>





An Economy Fit for the Future

An opportunity to RESET by attracting talent and intellectual capital and businesses to Te Taihu, with the expectation that they are focused on the economy of the future that we are trying to build.

Te Taihu Intergenerational Strategy, 2020

A Wellbeing Focus

A thriving productive economy is essential for the wellbeing of our people.

The plan has been designed to reflect a shift in thinking that is occurring at a global, national and regional level about how we approach economic development.

25 The plan encourages an emphasis on economic wellbeing and rejects a distinction between economic, social, cultural and environmental policy in favour of a more holistic approach. This approach recognises that focusing solely on economic growth has manifestly failed to deliver the right outcomes for our communities and the environment.

In other words, the type of growth matters. We want a more productive economy, but not at the expense of the environment or inclusion. To avoid that happening, efforts to address our productivity, inequality and environmental challenges need to be considered together rather than in isolation.

This approach is underscored and supported by Te Taihu Intergenerational Strategy. The strategy recognises that if we want to be an innovative, prosperous and inclusive region, then we all have a role to play in transitioning our economy and fostering a holistic wellbeing approach.

These are fundamental shifts in our approach to economic development. In many ways they represents another step in a journey that we are already on as a region, but this marks a significant milestone commitment and gives clear direction to the next 10 years of economic development.

A Collaborative Effort

Taking a collaborative approach allows us to harness the knowledge and resources of different communities to solve our complex challenges, together.

We have worked hard to get to this point – Project Kōkiri was formed during a time of crisis to respond to the immediate and urgent demands of the COVID-19 pandemic that shook our economy. Today the stakeholders that make up the Project Kōkiri collaboration are still actively working together and the forum's focus has evolved to look to the medium term recovery and regeneration of the region's economy as we continue to grapple with the pandemic and a range of other pressing challenges and transformative opportunities for the region.

Project Kōkiri has always been talked about as a model or a methodology, a step change in the way we organise ourselves around economic development and work collaboratively as a region.

Nelson Regional Development Agency (NRDA) led the development of this Regeneration Plan under the auspice of the Project Kōkiri forum. NRDA continue as convenor of the Project Kōkiri forum, but the leadership for the forum and the exciting and bold priorities that are identified through this plan are the collective responsibility of all the players that sit around the Project Kōkiri table. This document reflects a critical review of our current challenges and opportunities which sets out a clear direction that we can align our resources and decisions to over the next 10 years and beyond.

The power and potential of this plan is in the collective effort, rather than the individual pursuit or any particular project.

Iterative and Evolving Work

Waiho i te toipoto, kaula i te toiroa – Let us keep close together, not far apart

Project Kōkiri was often referred to as the ‘war room of the economic response’ for the region to the pandemic. It is noteworthy that we are still very much navigating those challenges and COVID-19 continues to impact our economy and daily lives. But uncertainty is now our new normal, and for our work to be effective we must look further into the future to understand how the next decade of economic development in this region can truly deliver for the communities of Nelson Tasman and Te Taihū.

This is a plan, not a strategy. It gives effect to the Te Taihū Intergenerational Strategy as the blueprint for economic development in the region and recognises that platform for change and transformation. This plan is purposefully focused and represents a clear set of priorities because whilst there is a strong mandate for the regenerative focus, we are in danger of overtalking with little action or progress. To take advantage of the opportunities presented to us, we need to be bold and take action now.

Since the initial draft of the Nelson Tasman Regeneration Plan was widely endorsed by regional stakeholders in 2021, including both our councils, many of the priority projects identified have advanced and the plan is already being actively used across the region to help guide investment and policy decisions. This updated Nelson Tasman Regeneration Plan, further focuses our efforts by strengthening the emphasis on our regional competitive advantages whilst maintaining our wellbeing approach and collaborative methodology.

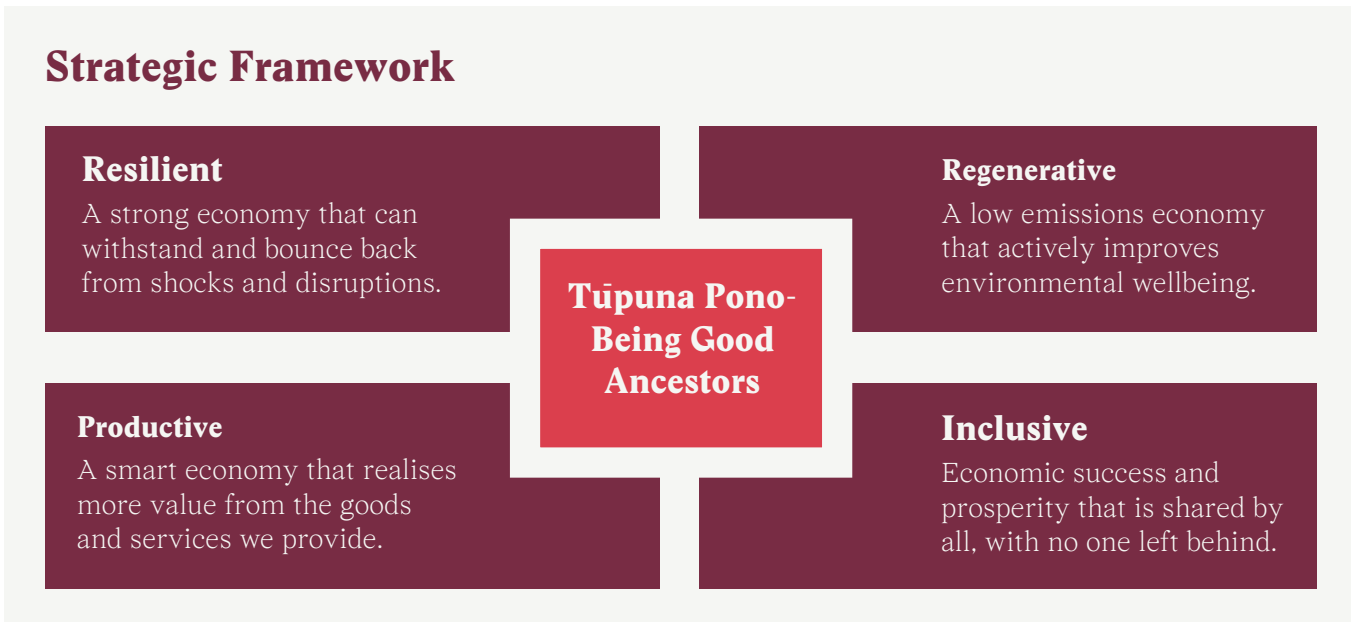
It makes sense to keep updating and evolving the plan as our conditions change, more opportunities and challenges present themselves and most importantly, as we learn more about what works and what doesn’t in our approach to activating and delivering this plan. We have already learned so much and this update can already speak to significant progress against the aspirations of the plan.



Strategic Framework: Key Missions

We have distilled our challenges and our identified opportunities into four key missions for our region, intentionally reframed to capture the task ahead that we all have a role in solving on behalf of the region.

These missions give us a sense of what regeneration looks like for the Nelson Tasman economy and capture the key challenges that are threatening our economic success.



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1. Resilient: Building a more resilient and future-proof economy

He kai kei aku ringa

COVID-19 is a rare and unprecedented shock to our economy. But it certainly won't be the last. The lingering risk of earthquakes and other natural disasters reinforce the need to focus on resilience.

There is a raft of policy reform coming down the pipeline that will have implications for our region from in water infrastructure, climate change, local government and health to name a few.

For some New Zealand communities, an over reliance on tourism has seen them dealt a devastating blow with the closure of our borders. Nelson Tasman was fortunate to have the primary sector which has performed relatively well throughout the pandemic. But diversification and increased resilience in our economy is essential to ensuring that we future-proof for the challenges ahead, in particular for climate change impacts.

2. Regenerative: Delivering economic growth that regenerates the environment

Whatungarongaro te tangata toitū te whenua

This is arguably the most important challenge of our time – how do we continue to enjoy the living standards afforded to many of us because of our economic position whilst dealing with our serious and urgent environmental challenges?

Ultimately, we ignore this challenge at our peril. Research has proven that consumer expectations and buying behaviours are changing with an increased awareness of the damage we are doing to our environment.

Shifting to a more regenerative economy is both the right thing to do and the economically sensible thing to do. Regeneration recognises that simply reducing our negative impacts is not enough, the goal is to have as many positive impacts as possible.

3. Inclusive: Ensuring our economic success is shared by all

Ehara taku toa i te toa takitahi, engari kē he toa takitini

Rising house prices, the cost of living and a dependence on low wage industries is putting pressure on our local communities. Much of the material hardship in our communities is experienced by the working poor. Secure, affordable and quality housing is out of reach for too many of our community.

Economic inclusion is the extent to which the entire population is participating in the economy, including (but not limited to) employment, particularly for our vulnerable communities. It speaks to the need for us to be cognisant of the fact that while economic growth is a worthy pursuit, it is pointless if the benefits do not flow through the economy to those who need it the most.

Our inclusive mission recognises that we are operating against a global and national backdrop of inequality – in New Zealand we have consistently greater income inequality than the OECD average and across numerous social measures of progress we see continuing gender inequality and overrepresentation of Māori and Pacific people in our least enviable cohorts. Inclusive growth requires that in our pursuit of prosperity – no one is left behind in that story. Inclusive growth also takes into account the impacts of growth on future generations – their financial welfare, the quality of the environment, social cohesion and connections, and the sustainability of their wellbeing.

4. Productive: Lifting the value of our goods and services

Mā tō rourou, mā tōku rourou. Ka ora ai te iwi

Productivity is the key to prosperity and arguably the most important driver of economic growth. It's a measure of the efficiency and reward from our inputs. We're not alone in our productivity challenge but we do rate poorly when compared to other regions which makes this challenge an important one for the region.

Improving productivity is about lifting the value of the goods and services we already make and creating new opportunities in high value sectors such as the knowledge economy. Sustained increases in productivity are necessary to support higher incomes in the region.

Productivity isn't about working harder, it is about working smarter and realising more value from the goods and services we produce. Our mission to lift productivity aligns perfectly with the idea of a circular economy which centres on 'additionality' whereby we maximise the usefulness of our goods and turn our waste into value creation opportunities.

Our Three Point Plan

To make all this happen, we will concentrate our resources on three regional themes that will present us with the most significant opportunities to unlock the potential of the regenerative economy:

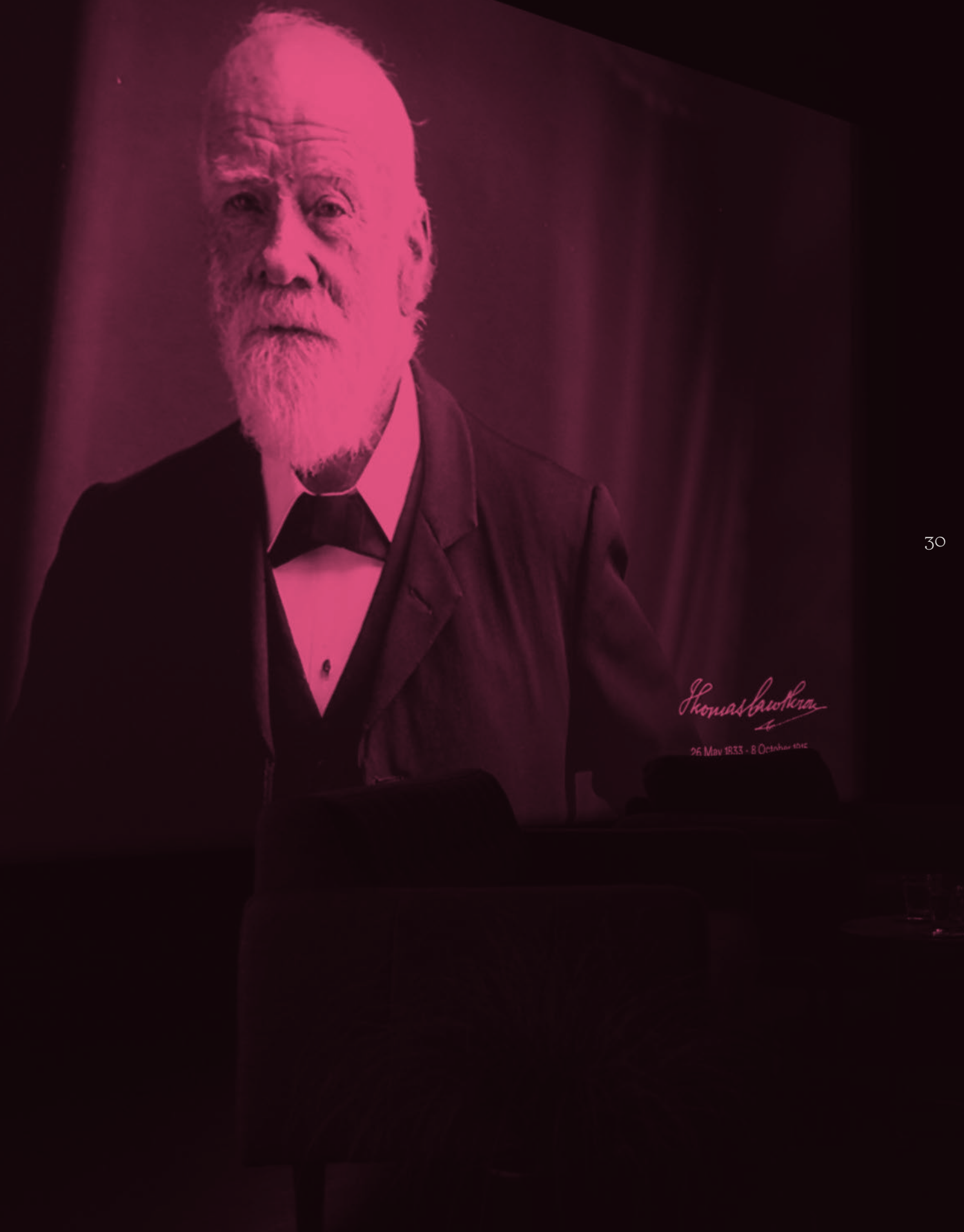
The three focus areas are:

- 1. We are Intelligent Guardians**
- 2. We are Makers & Creators**
- 3. We are a Blue Economy**

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Within each of these regional themes, a set of current priority projects have been identified which will help us deliver against our regenerative economy aspiration. Accelerating the achievement of these projects will not only make a major contribution to addressing the challenges we face as a region, including increasing our productivity; it will also make a multi-billion dollar contribution to New Zealand.

To complement and enable these strategic focus areas, two additional sections highlight the necessary enabling infrastructure and economic development priorities for the region, as essential conditions to both 'bind the rest together' and to realise and capitalise on our potential opportunities for regeneration.



1. We are Intelligent Guardians

Utilising research, science and technology to lead the world on regenerative solutions to our most pressing challenges

Intelligent Guardians is the term we have coined for the region as leaders in the creation of solutions. These solutions will create a competitive advantage for the region and deliver increased prosperity and wellbeing for our people, whilst supporting our industries to remain within environmental boundaries.

We are already home to New Zealand’s largest independent science organisation³⁸ and a cluster of innovative and intelligent companies that are applying science, research and technology to our industry sectors and that are focused on value creation through problem-solving and exporting solutions. By developing the knowledge, green and creative economies and focusing on our strengths in science and technology (particularly that which supports our primary sector), we will fuel increased productivity and the creation of high paying jobs which in turn will support service sectors as more disposable income circulates in Nelson Tasman.

Demand is growing globally for new solutions and there is a major shift in capital flow from investment funds ‘greening’ their portfolios towards investment in more ethical and sustainable businesses. Clever businesses³⁹ and skilled workers will be attracted here because Nelson Tasman helps companies that care, to thrive.

By leveraging our existing strengths, we can build further competitive advantage in the knowledge economy space. For example, whilst we already excel at early-stage research, there is scope for improvement in how we develop that research into commercial opportunities and applications. To do this, we must support our innovation ecosystem – from research through to product incubation and development, commercialisation and scaling – to reap the rewards of our research.

Intelligent Guardians is the most light-footprint of economic pursuits – it centres on exporting our knowledge and supporting our core sectors to realise more value from their goods. This puts us on a path of realising more value without extracting more natural resources and gives Nelson Tasman the opportunity to champion sustainable business in such a way that we can trade off it and realise the benefits from this across our whole economy.

To fully realise the potential of the Intelligent Guardians concept and to embed it as part of our identity and offering, we need to ensure that every business in the region can access tools and advice to enable them to participate. For example, whilst a restaurant may not be directly involved in a cluster of knowledge economy businesses in this space, they could establish food composting and zero waste actions as part of their commitment to being ‘Intelligent Guardians’.

We will also need to ensure that we are taking region-wide action to deliver on the promise of ‘Intelligent Guardians’ – addressing issues that matter including zero waste, climate change and biodiversity restoration. By connecting the dots on all the good work that is already happening and further expanding on that work, we have an opportunity to position Nelson Tasman as global leaders in sustainable and regenerative economic development.

“Any expansion in our prosperity has got to come from a way of using our creative capacity, our education system, our innovation, so that we’re getting value out of our knowledge without impacting further on our environment.”

Sir Paul Callaghan

³⁸Cawthron Institute

³⁹Amsterdam Circular 2020 – 2025 Strategy, Gemeente Amsterdam

Priority projects include:

- **Science and Technology Precinct and Investments**

The Port Nelson Science and Technology Precinct⁴⁰ is a gamechanger for the region. The precinct will house up to 1,000 knowledge workers with Cawthron Institute as the anchor tenant. The precinct will attract national and international tenants from a variety of sectors and accelerate Nelson's reputation as a centre of science and research excellence.

- **Te Taihu Climatorium**

The Climatorium project is being led by Wakatū Incorporation with a vision to develop an international centre of excellence that will position Te Taihu as the engine room for climate solutions in Aotearoa New Zealand and abroad.

Nelson Tasman has a unique opportunity to position itself as the knowledge economy epicentre of the climate transition, by unlocking private and public sector capital and looking for opportunities to invest in decarbonisation solutions through the Climatorium model.

It is based on the successful Danish Klimatorium model, with whom Nelson City Council and Wakatū Incorporation have signed a Principles of Collaboration agreement. A business case for phase one of the project is advancing.

- **Nelson City Library Complex Development**

The transformative new library complex development⁴¹ for Nelson city offers a once in a generation opportunity to define our identity with an iconic development that provides a hub for learning and accessing knowledge, connections and innovation for the whole community.

- **MissionZero: Businesses for Climate Action**

Businesses for Climate Action was inspired by the Te Taihu Intergenerational Strategy as a not-for-profit business alliance which supports programmes to build climate leadership in the business community. Business for Climate Action has recently launched MissionZero,⁴² an innovative campaign and platform to energise and support the Te Taihu business community on the journey towards zero carbon.

- **Regional Emissions Footprint**

To effectively manage our carbon footprint, we must first measure and understand it. Many of our businesses are now measuring (and in some cases offsetting) their carbon emissions. However, we have not previously had a clear understanding of the overall regional footprint.

Nelson City Council and Tasman District Council alongside the Nelson Tasman Climate Forum have worked to develop a regional emissions footprint calculation (nearing completion) that can be used for tracking our progress and inform priorities going over the coming years.

- **Destination Management**

The visitor sector supports events, the arts, hospitality, retail and outdoor experiences, and contributes to the vitality and vibrancy of Nelson Tasman.

The Nelson Tasman Destination Management Plan is a five year plan for the recovery and regeneration of our visitor sector. The Plan will deliver strategic visitor economy investment and positioning; support sector recovery, resilience and sustainable growth.

The plan includes initiatives for environmental stewardship, access, amenities and infrastructure, marketing and promotion and experience and product development. The plan was widely endorsed and identified actions have advanced with central government support for the first year, including industry investment in low carbon offerings.

The focus is now on completing the prioritised actions to deliver against the plan and to attract funding to support their implementation.

⁴⁰<https://our.nelson.govt.nz/stories/a-new-sci-tech-precinct-for-a-smart-little-city/>

⁴¹<https://shape.nelson.govt.nz/shape-your-library/background-information>

⁴²<https://missionzero.nz/>

2. We are Makers & Creators

Activating our identity and profile for arts, artisans and creativity

We are home to a wealth of talent in the makers, creators and curators space – both homegrown and those who have chosen to move here.

Nelson Tasman has long been recognised as a centre for the arts. We are the birthplace of international success stories like the World of WearableArt (WOWTM) and Smokefree Rockquest. An early focus on arts and creativity also gave us incredible facilities such as the Nelson Centre for Musical Arts (the first of its kind in the country), Nelson Provincial Museum (the first provincial museum in the country), the Suter Art Gallery (the third public art gallery in the country) and the Theatre Royale (the oldest wooden theatre in the Southern Hemisphere). These are world-class facilities that contribute enormously to the vitality and attractiveness of our whole region as a destination not just for visitors, but also for businesses and talent. Our proud history and strengths in the arts give us a compelling case for bringing it back into focus.

Nelson Tasman is also known for its artisan offerings across a huge range of food and beverages, many of which have developed into significant businesses and have international customers. From gourmet cheeses, chocolate and healthy snack foods, to craft beers, cider and speciality gins, to small-scale producers of international foods, we have a region rich in options and opportunities.

In our technical community too, creative minds are delivering for our economy: from clever architects and graphic designers to film producers and actors, through to pioneering specialists in virtual and augmented reality, we have a hive of activity to build off as we seek to affirm our place as a centre for innovation and creativity.

Yet despite our very strong track record and the contribution of the arts to our overall economic activity, the sector has not been seen as one of our economic strengths.

We know that investing in and backing creativity is important for our economy, our social cohesion, wellbeing and also for innovative ideas. This plan proposes that we work together to unlock and activate the potential of the creative sector to support our economic recovery and regeneration.

Priority projects include:

- **Arts and Artisans Events**

Developing Arts & Artisans Events that celebrate and showcase the arts and artisans of Nelson Tasman.

Nelson Tasman has already identified food & beverage, sporting, aviation, arts and culture events as focal points for the REF fund.

- **Enhancing the Great Taste Trail**

The success of the Great Taste Trail is an example of where visitor attractions can deliver huge benefits to the local community. There is ample opportunity to further develop and enhance the overall experience by celebrating the great taste concept. The Destination Management Plan recommends targeted food and beverage activations along the trail in collaboration with local food and beverage producers.

- **Nelson Arts and Creativity Strategy**

The Nelson City Council's draft Arts and Creativity Strategy sets a vision for how the community can work together to unlock the City's creative potential. It is intended that this will be a community strategy that will stimulate collaboration and cooperation to support a sustainable arts and creativity sector. The strategy is structured around five strategic pillars and outcomes:

- Whakaurunga - Participation
- Tuakiri - Identity
- Pou Tarāwaho - Infrastructure
- Tūranga Whakatū - Place-Making
- Ōhanga Auaha – Creative Economy⁴³

Important Note – *Project Kōkiri supported the development of the Nelson Arts and Creativity Strategy in the first version of the Regeneration Plan. This work progressed with Nelson City Council taking the lead and receiving funding from Creative NZ. At the time of writing, the strategy draft had been endorsed by Council and was out for public consultation. It is an example of an initiative that was identified in the last plan and has progressed successfully.*

⁴³<https://shape.nelson.govt.nz/nelson-arts-and-creativity-strategy>

- **Te Āwhina Marae Redevelopment**

The \$28m Te Āwhina Marae redevelopment project is a 10 year vision to completely transform the marae facilities in Motueka to support the cultural and economic revitalisation of mana whenua in the area.

The project has a strong emphasis on developing capability and succession for Toi Māori, in particular cultural capabilities such as whakairo (carving) and raranga (weaving). The project includes a cultural tourism strategy, a Māori trades training academy and new facilities to support the growth of artistic and cultural opportunities for Te Taihū.

The redevelopment is of regional significance as the marae is home to the only Whare Whakairo (Carving Studio) in the region, which services the wider Te Taihū region. The project is the first in a pipeline of potential projects for marae development throughout the region.

- **Screen Te Taihū**

In collaboration with Marlborough District Council, plans are advancing to develop Screen Marlborough/Te Taihū as a regional approach to attracting film opportunities to the region. Work is already underway to provide a one stop shop for location scouts and to further develop networking and capability building opportunities for film and the wider screen eco-system here in Te Taihū.

- **Art/Work Creative Careers**

The Art/Work Creative Careers programme⁴⁴ is being run by the Nelson Tasman Chamber of Commerce in partnership with the Ministry of Social Development to support artists in the region to develop more sustainable careers and businesses from their work. The pilot programme has been incredibly successful with over 130 registrations from working artists in the region and 65 of these artists being actively supported and coached through tailored professional development plans.

The free career support and business mentoring programme is supporting creative practitioners who are looking to develop a more financially viable and sustainable career in the arts. It was signaled in the first draft of the Nelson Tasman Regeneration Plan and has been successfully run as a pilot. The focus is now on securing the long-term funding and sustainability of the program.



⁴⁴<https://www.artwork.org.nz/>

3. We are a Blue Economy

By realising the full potential of a clever and connected blue economy, we can drive simultaneous social, ecological and economic gains.

You Can't Go Green Without Blue

“All around the world, countries are looking to transition to a ‘green’ economy that is low in carbon, socially inclusive and resource efficient. In its simplest form, ‘green’ has become short for a sustainable social, environmental and economic future.

The ‘blue economy’ is central to the green ecosystem: oceans influence all natural cycles and are also directly or indirectly involved with all economic sectors. Oceans produce up to 80 percent of the oxygen we breathe, while nearly 40 percent of the world’s population depend on marine and coastal biodiversity for their livelihoods. For these reasons, the ‘blue’ component of the ‘green’ transition to a more sustainable global economy cannot be overlooked.”

You Can't Go Green Without Blue, KPMG International, June 2021

The blue economy is identified as a priority in the Te Tauihu Intergenerational Strategy. In many ways it will define the region’s future economic distinctiveness.

The oceans are central to our identity and interwoven history and we have a strong foothold in the oceans economy. We are a leading region in ocean-based industries, including boatbuilding, engineering, textiles, scientific research, digital tech, education, and in high value-add products (e.g. nutraceuticals). We are home to the largest fishing port in Australasia and our region is made up of predominantly coastal

communities. Iwi, hapu and whanau involvement in blue economy activities is strong. We are the hub of New Zealand’s sustainable seafood industry and we are home to world-leading capabilities in marine science, research and technology. Through over 400 unique businesses, our region boasts a diverse ecosystem of support services for the blue economy.

The blue economy is also intrinsically linked with Māori economic development. Kaimoana (seafood) has been the top export for Māori authorities for many years (representing over 40% of Māori authority exports) and is experiencing year on year growth.⁴⁵

Our region’s strength in the blue economy is set against a backdrop of global opportunity and expansion. The value of ocean-based activities is expected to double globally by 2030, outpacing the broader economy by 20%.⁴⁶ Global demand for ocean proteins is projected to grow hugely by 2050⁴⁷ and New Zealand is well positioned to take advantage of this growth, if we work together to unlock that opportunity.

Whilst the economic opportunity is clear, there is also a desire to focus on a regenerative blue economy that can support improved food security, improved biodiversity and ecosystem health, build our resilience and advance our climate mitigation efforts. Indeed, the sustainability of our existing oceans economy centres on climate-sensitive natural resources. Although generally perceived as threats, climate change and environmental impact management also represent a distinct opportunity for blue economy solutions and development.

By taking a whole of systems approach, we have the opportunity to enhance the wellbeing of our oceans ecosystem and coastal communities whilst improving the productivity and circularity of our current economy. We can achieve this by focusing on realising opportunities right across the value chain.

Nelson Tasman has the right building blocks in place to capitalise on these opportunities and to lead innovation and productivity improvements in New Zealand’s blue economy.

⁴⁵<https://www.stats.govt.nz/news/exports-continue-to-rise-for-maori-authorities-through-covid-19>

⁴⁶<https://www.cawthron.org.nz/our-news/neosaxitoxin>

⁴⁷<https://www.cawthron.org.nz/our-news/neosaxitoxin>



Priority projects include:

- **Moananui – Te Taihu Blue Economy Cluster**

The challenge in unlocking the promise and potential of Te Taihu blue economy is in coordinating collaboration and fueling innovation in the sector. Moananui is the name gifted to the Te Taihu blue economy cluster which is being formed as a regional alliance to realise, accelerate and leverage the region as a global leader in creating a highly valuable, regenerative, collaborative and inclusive blue economy.

The cluster will be a facilitator and connector for the wider blue economy aspirations and projects to assist in attracting investment in research and development, unlock the potential for commercialisation opportunities, new high-value products and improving oceans-based innovation and technology.

- **Port Tarakohe Redevelopment**

The forecast growth for mussel production in Golden Bay and Tasman Bay is 500% – reflecting 300ha of new consented space to be operational by 2029. By enabling that increased production, the long-awaited Port Tarakohe redevelopment project is forecast to unlock \$1.4b of added value over the next ten years. The existing port facilities are limited by operational capacity and health and safety constraints.

The redevelopment is also crucial for the resilience of the port to natural hazards and for Golden Bay itself, particularly by providing an alternative freight route to the vulnerable Takaka Hill road route.

- **PC3 Facility**

The PC3 facility proposal is a major project of national significance. The proposal is to construct a Physical Containment Level 3 facility to enable research into disease, pathogens, aquatic health and vaccine research.

The research will prevent and manage the impact of biosecurity events on the blue economy, a need that was emphasised following the devastating *Bonamia Ostrea* outbreak in 2012. There is widespread agreement that a PC3 facility is vital to the aquaculture industry's future resilience.

- **NeoSaxitoxin Cawthron Research Project**

Cawthron Institute has been working with project partners Boston Children's Hospital (BCH) and Proteus on development of a non-opioid post operative pain medication based on an algae extract⁴⁸. Following successful USFDA Stage One trials, the project is seeking funding to undertake Stage Two clinical trials.

Successful commercialisation of a medicinal product using algae extracts would unlock a new high-value sector for algae, deliver significant growth opportunities for the Nelson Tasman blue economy in primary extraction and processing, deliver significant earnings for New Zealand and strengthen our global profile for research capabilities.

- **Open-Ocean Farming**

The establishment of an open-ocean aquaculture space will increase the speed and commercial scale-up of sea-based research and innovation.

Through a partnership between research institutes, the aquaculture industry and engineering firms, this initiative will deliver significant impact for the region and for New Zealand, supporting the realisation of Central Government's \$3bn aquaculture goal.

The project will provide climate and financial resilience to the aquaculture industry in Te Taihu whilst enabling development in high-value species, new methods and new capabilities.

The Blue Endeavour site application is testing the concept. The outcome of this process will support or deter other innovators and investors across New Zealand.

⁴⁸<https://www.cawthron.org.nz/our-news/neosaxitoxin>



Enabling Infrastructure

All of our economic development and regeneration aspirations hinge on the region's ability to keep pace with infrastructure needs and address our current shortfalls. Well-planned and interconnected infrastructure is essential to help us deliver high productivity and improved wellbeing outcomes for the region.

Our current infrastructure challenges are considerable and compounded by the pressing challenges of climate change related impacts such as sea level rise and extreme weather events. Our transport and housing infrastructure are particularly challenged – we need resilient infrastructure that can cater for future growth whilst dealing with our existing challenges and bottlenecks that are impacting the region today.

39 Failing to provide this infrastructure presents significant risks for Nelson Tasman as we already grapple with increasing congestion and lack of affordable housing supply, and challenges in meeting the demands on our schools, as another example.

Infrastructure investment also provides the most obvious opportunities to tackle some of our major challenges such as the need to transition to a net zero emissions circular economy and adapt to the impacts of climate change. Advancements in technology offer the potential to develop much smarter and more efficient infrastructure networks across the region.

Getting this right will require a coordinated approach, increased levels of collaboration and partnership, and perhaps most importantly sustained levels of advocacy on behalf of our region to central government. Future-proofing and investing in our infrastructure is a key enabler of the rest of this plan which makes a focus in this area an absolute priority.

Priority projects include:

Transport

SH6 is the only freight route to our Port and airport, and the economic and social connector linking Nelson, Richmond and beyond; making us extremely vulnerable.

Decades of Government underinvestment in our roading network is affecting our resilience to address future needs, including our ability to provide new active, public, and low-carbon transport solutions. This impacts our productivity and connectivity, as well as our resilience to extreme weather events.

Iterative solutions have been presented to consecutive Governments over the past forty years, and Nelson City and Tasman District now have a design solution in the form of the Nelson Future Access Business Case⁴⁹ that has been approved by Waka Kotahi. However there is still no commitment from the National Land Transport Fund to progress the project.

Housing

Our housing affordability and supply issues need collaborative support from Government to address one of the region's critical socioeconomic impediments.

⁴⁹<https://www.nzta.govt.nz/projects/nelson-future-access-project/>

Waimea Community Dam

The \$195m three-year Waimea Community Dam project is currently under construction, due for completion in 2024. It is the largest dam to be built in New Zealand for 20 years and will hold 13 million cubic metres of water once complete.

The Dam will discharge water into the Waimea River to maintain water levels – the Waimea River feeds the networks of aquifers on which our network of water takes rely. Modeling has forecast that the dam, once completed, will enable an extra \$37m of GDP per annum through our horticulture sector, which supports many other sectors along its supply chain, including business support, technology and research, and both the Nelson port and airport. Additionally, it will support population growth and housing infrastructure.

Urban Regeneration

Urban settlements are undergoing revitalisation and regeneration efforts to enhance liveability and social vibrancy of our CBDs post-COVID, and adapt to challenges such as congestion, climate change, changing retail behaviours, and the need for new housing models and intensification of housing densities.

Nelson Hospital Redevelopment

The Nelson Hospital Redevelopment has been a longstanding identified need in the region to cater to changing needs, population growth and increase the resiliency of the hospital facilities.

The redevelopment project is likely to be the biggest capital project in a generation for Nelson Tasman. Funding has been included in the 2022 Budget from central government to support the redevelopment.

Rural Connectivity

Rural connectivity is an ongoing and complex challenge for the region. Despite government led efforts, many of our regions businesses and entrepreneurs struggle with access to a high speed internet connection or are disrupted by mobile blackspots in communications.

To get a clear understanding of this challenge, we must evidence the true extent of our digital connectivity issues, as raised by businesses and residents.

Enabling Economic Development

Underpinning this Regeneration Plan is the portfolio of economic development enabling initiatives and actions that are necessary to realise the priorities identified throughout the plan and enable economic development in the region.

Projects include:

• Nelson Tasman Workforce Development Plan

Workforce development will be one of the defining issues for the period of this Regeneration Plan. Labour supply and skills shortages are a major challenge for the region, particularly in the face of significant capital projects such as the Nelson Hospital redevelopment, Science and Technology Precinct, Te Āwhina Marae redevelopment, the library redevelopment project, and housing developments. Tackling our challenges in skills and workforce supply will, in part, determine our ability to deliver on many of the aspirations set out in this plan.

The Regional Skills Leadership Groups and their Workforce Development Plans are central government initiatives to guide the ROVE tertiary education reform and provide localised advice on workforce planning and development. The Nelson Tasman Regional Skills Leadership Group has developed the first Workforce Development Plan for the region which focuses on construction and the blue economy as priority sectors and on rangatahi and older workers as focus demographics for support through the plan.

The next version of the plan will focus on forestry and the visitor sector.

• Regional Skills Hub

The Regional Skills Hub proposal is about ensuring that we have the critical workforce development in place to meet regional skills needs and especially to enable major community infrastructure development over the coming five plus years as identified above.

The skills hub can maximise opportunities for local businesses, labour and procurement, align the needs and supply of trade skills, training and procurement. This will maximise the opportunities for business, youth and support industries in the region by planning for workforce support needs and supporting young people into employment and education pathways.

• Regional Identity

The Nelson Tasman Regional Identity was initiated in 2017, to formulate a cohesive brand identity for the region that celebrates our strengths across talent, business and investment attraction as well as visitation.

Since the development of the Identity, much has changed in the world and here in the region. The Te Tauihu Intergenerational Strategy introduced a new and widely endorsed narrative for the region and the We've Got This (Kei a Tātou) campaign inspired us to provide more platforms for locals to tell their own stories and be ambassadors for the region.

The culmination of these and many other factors have led to the need for a refreshed and evolved regional identity. The aspiration is for a truly transformative regional brand that acts as a compass for placemaking, gives people a sense of belonging and space to tell their own story. This will in turn support greater levels of awareness and profiling for our regions businesses and differentiate us through competitive advantage and leaning into our authentic creativity.

- **Nelson Tasman Productivity**

Low productivity is a significant challenge for the region and closing the gap by increasing our regional productivity presents a significant opportunity that could support other outcomes such as a lower carbon footprint and higher wages.

The Nelson Tasman Productivity Project is focused on understanding our productivity challenges and successes, and developing a strategic approach to closing the productivity gap. This work includes a focus on local frontier firms – showcasing and strengthening firm level behaviour and ecosystems.

- **Mahitahi 2.0 Innovation Hub**

Mahitahi Colab is a proven model for supporting collaboration and innovation in the Nelson Tasman region. As a partnership between the Nelson Regional Development Agency, Nelson Marlborough Institute of Technology, and Nelson Tasman Chamber of Commerce, it brings together key actors in economic development, provides a valuable co-working space for Nelson City and is host to a large array of innovation and capability building events.

While the Mahitahi Colab entity is well positioned to create an environment in which innovation is fostered and modelled, the current premises are a constraint. There is demand for more event spaces and greater co-working capacity, to enable a greater level of interaction and subsequent collaboration, to expand its support for innovative and ambitious businesses, and to support youth innovation.

The Mahitahi 2.0 Innovation Hub is a proposal to grow the colab model and expand on the success of the existing facility, bringing together a unique blend of partners, entrepreneurs, collaborators, and innovators – as a capability builder through education, mentoring, student internships, research and innovation.

How the Region Will Deliver

We have a proven track record of working collaboratively in economic and regional development. The Te Tauihu Intergenerational Strategy has been recognised and celebrated nationally, Project Kōkiri is an award-winning collaboration and NRDA is a multi-award-winning economic development agency.

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Maintaining and building on this collaboration going forward is fundamental to progressing this Regeneration Plan. Without sustained levels of collaboration to drive, and investment to build capability and capacity, this Plan is unlikely to fully deliver on its aspirations. As a collaborative forum, Project Kōkiri does not possess resources or act as an agency: instead, the construct of Project Kōkiri helps guide investment and decision-making across a range of agencies in the region who have a role and an influence in the economic development space. For this reason, the plan includes a strong focus on delivery of priority regional projects for which responsibility sits with various regional stakeholders.

A maturing model of collaboration

To reflect the medium term focus and adopt a more enduring approach in supporting the delivery of this Regeneration Plan, the core purpose of Project Kōkiri will be formalised, as a collaboration of regional leaders for Nelson Tasman who collectively:

- Identify, discuss and provide strategic advice on critical and current, emerging and future issues, opportunities and challenges in relation to regional economic wellbeing
- Endorse and act as custodians of the Regeneration Plan, including:
 - maintaining a collective approach to economic regeneration of the region through applied values and principles of collaboration
 - ensuring a well informed and inclusive Regeneration Plan, developed and implemented through meaningful engagement
 - agreeing on priority projects to pursue under the Plan, including review and revision of priorities over time, with consideration for alignment with strategic aspirations, and achievability
 - periodically reviewing the Plan's implementation progress

Measuring Success

An important part of this Plan is the development of a monitoring and evaluation framework that will enable us to track progress. This will include the collation and analysis of data that will be periodically reviewed by Project Kōkiri. The first step is to determine appropriate measures and indicators for which data is available and this does present some challenges.

Well-established indicators such as productivity and GDP, average incomes, housing affordability and traffic flows for example, have easily-accessible datasets behind them. Others are more challenging such as some of the indicators used for the Government’s Living Standards Framework that are not available at regional level.

Our selected range of indicators map our long-term missions and regional issues. Some of these will change only very slowly over years, while others will be more dynamic. These indicators will be assessed on a regular basis to track our progress over time, alongside the progress of our priority projects. Indicators may change from time to time.

NRDA will be responsible for developing a 2022/23 baseline dashboard, data collation and monitoring, and will report to Project Kōkiri on a regular basis.

Monitoring Part 1 – measures for our four long term missions

Resilient⁵⁰

- Regional income equality – evenness of distribution
- Regional economic diversification – degree to which GDP is spread across sectors

Regenerative⁵¹

- Percentage change in total solid waste generation per annum
- Percentage change in domestic kerbside refuse per capita per annum
- Business innovation in region (\$NZ)
- Percentage change in the average wage in region
- Percentage of Council supplier contracts with carbon reduction KPI’s
- Percentage change in tCO₂e per million \$NZ GDP

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Inclusive⁵²

- Labour productivity
- Healthy life expectancy yrs
- Employment rate %
- Net income GINI
- Poverty rate %
- Wealth GINI
- Median Income \$ wage or household
- Public debt %
- Dependency ratio

⁵⁰Definition <https://www.eda.gov/ceds/content/economic-resilience.htm>

⁵¹Definition <https://www.aucklandcouncil.govt.nz/plans-projects-policies-reports-bylaws/our-plans-strategies/topic-based-plans-strategies/environmental-plans-strategies/aucklands-climate-plan/Documents/auckland-climate-plan.pdf>

⁵²Definition <https://reports.weforum.org/the-inclusive-development-index-2018/tables/>

Productive⁵³

- GDP per capita
- GDP per filled job
- Labour productivity growth
- Growth in labour input
- Growth of high-productivity industries versus low

Monitoring part 2 – measures for our specific regional focus points**Challenges**

- Median wages
- Workforce supply
- Housing affordability – mortgage
- Housing affordability - rental
- Housing cost median house price
- Housing cost median rental
- Housing availability – Kāinga Ora waiting list
- Housing availability – MSD temporary accommodation
- Average household income

Spotlight on Māori economy

- Number of Māori businesses registered with the Māori Business Network
- Regional local government procurement % from Māori businesses (legally 5% min)

Spotlight on climate change

- Regional carbon footprint – change in total emissions
- Zero Carbon – number of businesses registered with EKOS

Other relevant measures not included elsewhere

- Income inequality – gender, Māori, Pasifika
- High-paying jobs created
- Significant DMP measures TBD
- Creative Sector measures TBD
- Size of blue economy
- Infrastructure investment

Monitoring part 3 – tracking our priority projects

Actual priority projects to be tracked against the project's specific measures of progress.

whakatauki will be included on this page (awaiting wording)

⁵³Definition <https://www.oecd.org/employment/oecd-compendium-of-productivity-indicators-22252126.htm>

Appendix 1

Master Projects List

July 2022

Area	Priority Project	Lead Agency
Blue Economy	Moananui Blue Economy Cluster	NRDA
	Port Tarakohe	TDC
	PC3 Facility	Cawthron Institute
	Neosaxitoxin Research Project	Cawthron Institute
Knowledge Economy	Science & Technology Precinct	Port Nelson
	Library Complex Redevelopment	NCC
	Te Tauihu Climatorium	Wakatū Incorporation
Creative Economy	Marae Redevelopment	Te Āwhina Marae
	Screen Te Tauihu	NRDA
	Art/Work Creative Careers	Chamber of Commerce
Infrastructure	Transport	Collective
	Housing	Collective
	Waimea Dam	TDC
	Urban Regeneration	Collective
	Nelson Hospital Redevelopment	HealthNZ
	Rural Connectivity	NRDA/Collective
Economic Development	Workforce Development	RSLG
	Regional Skills Hub	Central Government
	Regional Brand	NRDA
	Productivity Project	NRDA
	Mahitahi 2.0 Innovation Hub	Innovate Trust
	Destination Management Plan	NRDA
	MissionZero	Businesses for Climate Action

Appendix 2

Master List of Main Source Documents

New Zealand Government Aquaculture Strategy
New Zealand Government, 2019

Te Taihū Intergenerational Strategy – Tūpuna Pono
Wakatū Incorporation, November 2020

Nelson Tasman Economic Briefing
Benje Patterson, People and Places, March 2022

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Nelson Tasman Draft Workforce Development Plan
Ministry of Business, Innovation and Employment, June 2022

Nelson Tasman Briefing for Ministers, Impactful Partnership and Investment
Nelson Regional Development Agency, June 2022

**Nelson Tasman
Regeneration Plan
2021 – 2031**

**Project
Kōkiri 2.0**

kokiri@nelsontasman.nz
www.projectkokiri.nz