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Silos, Competition and Fragmentation in New Zealand's Vocational Education System

Abstract

New Zealand persistently underperforms in productivity compared with many comparator nations. Solutions require active upskilling of the nation's domestic population. Piecemeal funding across competing vocational education providers, and over-reliance on internationally qualified migrants, are contributors to fundamental failures in domestic skills development and employment. Informing this analysis are notable failures in governance and delivery in three high population-growth regions.

A cohesive vocational educational system with intentional investment in domestic skills development is critical. Clear, multi-level governance, attention to the place of learning, strong regional voice, iwi/Māori partnership, and industry alignment are required if New Zealand is to achieve the productivity gains needed to lift overall economic performance.

Keywords productivity, tertiary education, regional development, workforce, governance, collaboration

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New Zealand has a longstanding history of challenges in respect to productivity and GDP growth, factors critical to the country's future prosperity and well-being (Cook, Devine and Janssen, 2024; Productivity Commission, 2024; OECD, 2025; Petrescu, 2025). Solutions to improve productivity include the well-recognised requirement to build human capital (Kokkinopoulou, Vrontis and Thrassou, 2025; OECD, 2006), something understood by New Zealand's coalition government and noted in the finance minister's 2024 Budget speech: 'Lifting productivity will be our Government's focus, whether that be through raising educational achievement, delivering better infrastructure, enabling investment, or any of the multitude of areas that need addressing' (Willis, 2024).

Encouragingly, 'developing talent' has been identified as the first of five pillars within the government's Going for Growth strategy, recently released for public consultation (Ministry of Business, Innovation and Employment, 2025). 'Raising educational achievement' is recognised internationally as key to lifting national productivity, with education described as a 'transmission channel between inequality and growth'

(Kokkinopoulou, Vrontis and Thrassou, 2025; Benavides et al., 2012; Cerra, Lama and Loayza, 2024; Holden and Zhang, 2018). But New Zealand relies increasingly on migrants to fill skill and workforce gaps (Buchan et al., 2025; Productivity Commission, 2021a), importing skills from other countries while not adequately supporting human capital potential within the domestic population (Productivity Commission, 2021a; Rankin, 2023). This arguably ‘free rider’ labour market policy is reflected at differing educational and skill levels (Erwin et al., 2020): 51% of overseas-born people in New Zealand aged 25–64 hold a diploma or higher qualification, compared with only 36% of New Zealand-born people in the same age range, one of the largest among OECD countries. This points to the need for the country to better support skills development in its own people (Scott and Ali, 2024; Hanga-Aro-Rau, 2022; NZES, 2024).

Scott and Ali (2024) summarise the latest learner-related findings within the

OECD, where New Zealand’s participation continues to be lower than average among 15–19-year-olds. Relatedly, it has one of the highest proportions of adult learners completing level 4 qualifications, with an average age of over 30 – the highest age average in the OECD alongside Australia and Ireland (ibid.). This suggests that early school leavers return to acquire basic qualifications later in life. Furthermore, New Zealand is also challenged by a skills retention issue, with many foreign-born workers using New Zealand as a stepping stone to Australia, as demonstrated empirically in a recent report about the flow of internationally qualified nurses to Australia (Buchan et al., 2025).

In this article, we seek to demonstrate how improvements in national productivity require increased attention to vocational education and skills development, particularly in regions with high population growth and with known gaps in educational access and delivery (Brownie et al., 2024). Information to support this assertion, and

our conclusions around current shortcomings, are drawn from a range of sources, including published literature, government websites, stakeholder blogs and policy submissions, responses to Official Information Act requests, and work undertaken by the New Zealand Productivity Commission (New Zealand Government, 2021; Productivity Commission, 2024). In exploring these sources, we gained deeper insights into current challenges within New Zealand and considered the issues in the light of global best practices in national and regional skill-building and workforce retention.

The critical imperative: what is at stake?
Cross-national studies make clear the extent to which inequality negatively affects factors such as welfare spending, health status, crime and economic growth (Brookes, 2023; Guillemette et al., 2017). Factors such as non-participation in training or employment, intergenerational unemployment, and disparity between

Figure 1: Waikato, Northland, and BOP population growth, youth, Māori and Pacific profiles

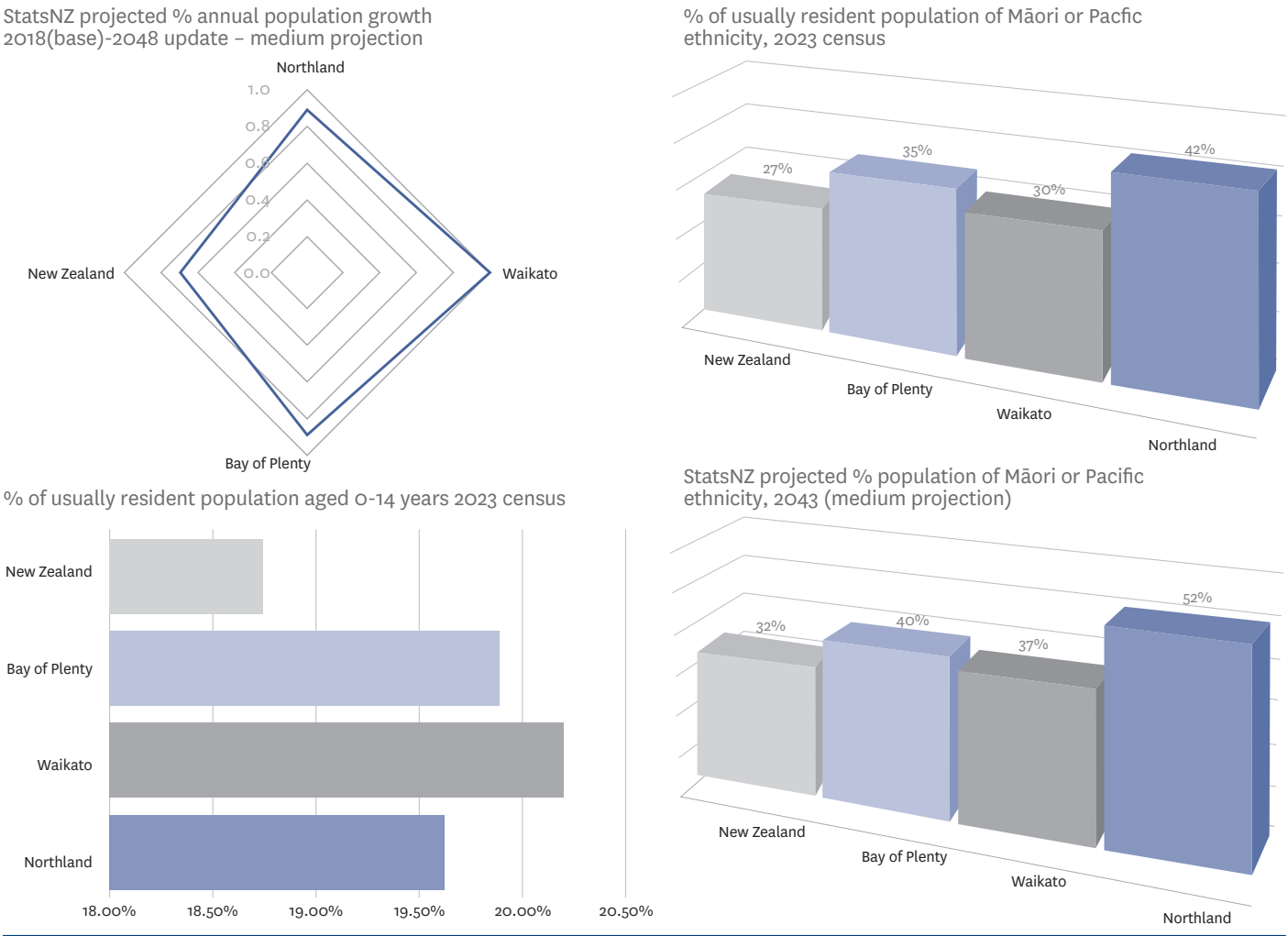
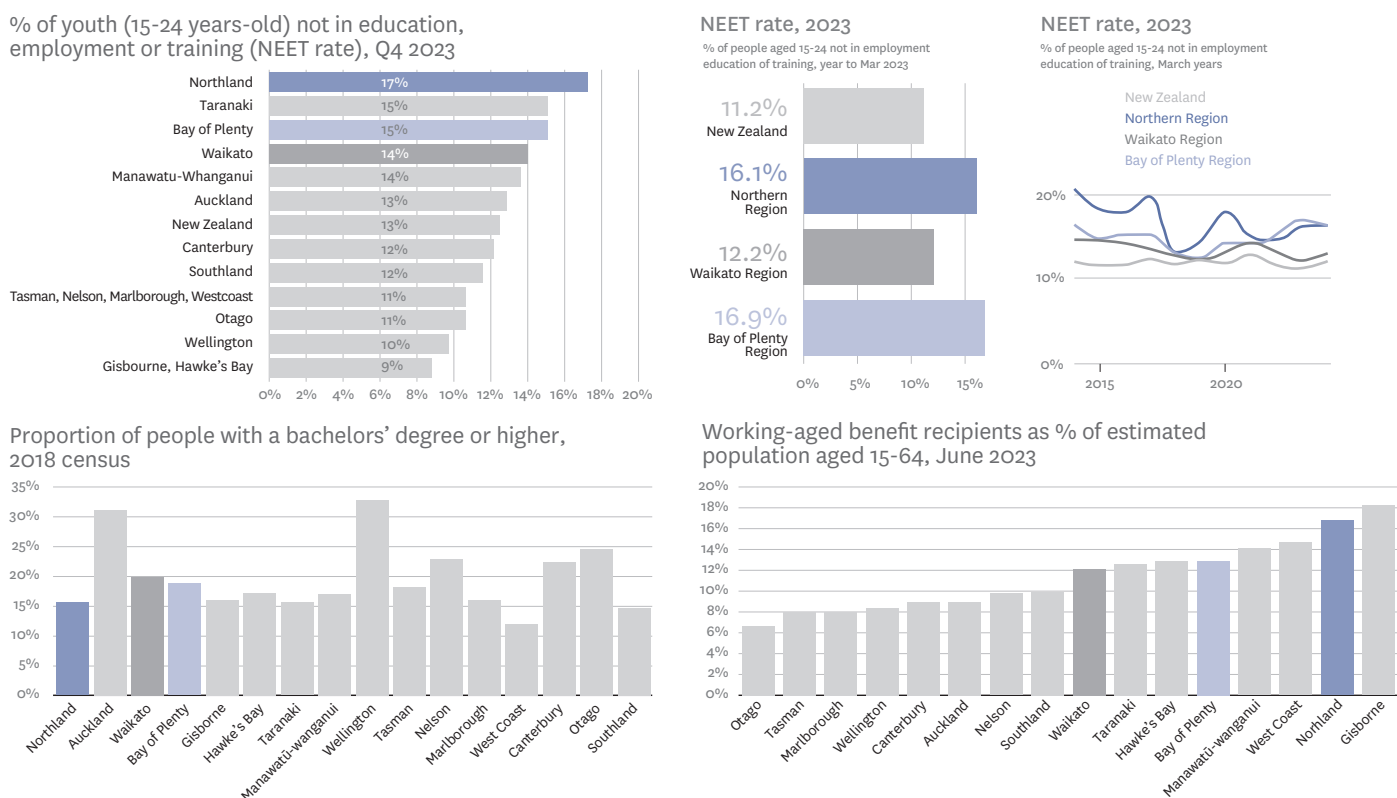


Figure 2: Regional socio-economic profiles of the Waikato, Northland, and Bay of Plenty



Sourced: Informatics, 2023, 2024

domestic and foreign-born workers show a critical need for effective and accessible education. A challenging future exists unless benefit utilisation, and especially NEET (not in employment, education or training) patterns for New Zealand-born youth, can be markedly improved – challenging not just for those young people, but for the nation's wider social and economic future.

The national social and economic risks of current system failures in domestic skills development is well-illustrated by the Northland, Waikato and Bay of Plenty regions, our key focus in this article. As authors we give voice to these regions in which we respectively work and reside and share commitment in advocating for accessible educational opportunities for learners. As the regions with the fastest population growth (Statistics New Zealand, 2022), these areas are high-potential engine rooms for national economic development and growth. Each has a significantly younger population than New Zealand as a whole, with relatively high Māori and Pacific populations (Figure 1), reflective of the potential within the nation's future (Spoonley, 2024). As such, our argument that these regions require improved efforts is well-founded, based on equity and

regional need (Brownie et al., 2024; Erwin et al., 2020).

Concerningly, these three regions are among the regions with the highest NEET rates among 15–24-year-olds, as well as higher than average percentages of the working-age population in receipt of a benefit (Figure 2): Northland leads the country with 10.9% of the working-age population receiving jobseeker support, with Bay of Plenty 8.3% and Waikato 7.2%, against a national average of 6.3% (Ministry of Social Development, 2024a). The need to do better is illustrated in Waikato, where geographic inequity in vocational education and training delivery has resulted in 'educational deserts' with very low learner participation rates (Brownie et al., 2024).

In short, these rapidly growing, youthful and ethnically rich regions hold significant potential for New Zealand's future workforce and skill base. But their current workforce situation is far from promising. Given the known negative impacts of lack of educational participation on multiple societal outcomes (Brookes, 2023; Guillemette et al., 2017), this paints a bleak picture of the nation's future. Understanding why this is the case is a complex matter which, as a start, requires

an understanding of the current structure, to which we now turn.

Current status: what patterns are visible in New Zealand?

Currently available information overwhelming points to a fragmented system of vocational and broader tertiary education provision, with no clear path for the future. Some key problems are apparent.

Continuous change

The roll-out of vocational education reforms (RoVE) (Tertiary Education Commission, 2018, 2019a) has seen New Zealand's vocational education system subjected to unprecedented levels of change, resulting in confusion, unrest and reduced capacity (Diester, 2024; Watene et al., 2024). The Ardern Labour government implemented RoVE following a long history of service duplication, financial loss and education/industry disconnect. The reforms aimed at achieving improvements by centralising functions with a view to lifting quality and improving education/industry connection, bringing the two rival strands of vocational education and training – workplace-based and provider-led – together in a single framework

(Diester, 2024; Tertiary Education Commission, 2019b; Tertiary Education Union, 2019). A new national institute – Te Pūkenga – combined polytechnic and industry training organisations, and workforce development councils and regional strategic leadership groups were established. However, criticism was levelled regarding the slowness and effectiveness of implementation (Ryan, 2022, 2023).

The current National-led government campaigned on disestablishing Te Pūkenga and a return to regional decision making within its first 100 days in office (New Zealand National Party, 2023). This was not achieved, subsequently explained as being due to the overly complex change process and requirements (Fallow, 2024). Timelines were reset, with operational decision-making powers to be retained by Te Pūkenga until January 2026 (Simmonds, 2024). The time frames highlight the complexity of the change process, including the required legislative change, detailed viability reviews, change management plans, processes for the appointment of local transition boards, and the alleged \$157 million cost of dismantlement (McConnell, 2025). Meanwhile, various questions remain unanswered, such as how the advantages of the Te Pūkenga model should be and will be retained – for example, the benefits of national library services, finance systems, and accreditation of national curricula across a small island nation of fewer than 5.5 million people. It is difficult to see how a return to fragmentation and duplication of such services provides the most efficient use of taxpayer resources.

A narrow focus on financial performance

The need to improve financial performance was a key driver of the 2019 RoVE reforms (Tertiary Education Commission, 2017; Tertiary Education Union, 2019). By mid-2024, with savings not having materialised to any meaningful degree, the Tertiary Education Commission served written notice under the Education and Training Act 2020 that Te Pūkenga must source specialist help in disestablishing the entity and identifying options for the formation of viable regional entities. It was directed to appoint four specialist insolvency firms, suggesting that financial criteria

were to be the key consideration in the disestablishment process (Fowler, 2024).

Shortcomings with this approach were two-fold. First, the appointment of different insolvency firms for different Te Pūkenga entities rather than a whole-of-sector approach created segmentation, militating against a broad system-wide analysis of issues in the tertiary education system (such as duplication and competition).¹ Second, the narrow focus on financial imperatives appeared to counter instructions within the minister's letter of expectation directing Te Pūkenga to 'support as much regional decision-making as possible' and to 'ensure vocational education and training continues and staff and learners are supported' – decisions rested with receivers

and supports for domestic learners, proceeded without local industry and stakeholder input. With decisions made by insolvency practitioners behind closed doors, no obvious mechanism existed for community leaders to identify possible solutions and partner in decision making (Fowler, 2024). In the face of community unrest, in May 2025 Te Pūkenga appointed sole 'community advisors' for each ITP, but by this stage many decisions had already been made.

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rather than regional decision makers (Simmonds, 2023). The narrow focus saw major decisions proceeding without comprehensive cost-benefit analysis and little, if any, stakeholder consultation. Of further concern, the narrow focus on financial viability shifted focus from other RoVE goals, such as better aligning work-based ITO (industry training organisation) and education-based ITP (institutes of technology and polytechnics) functions.

Silenced regional voices

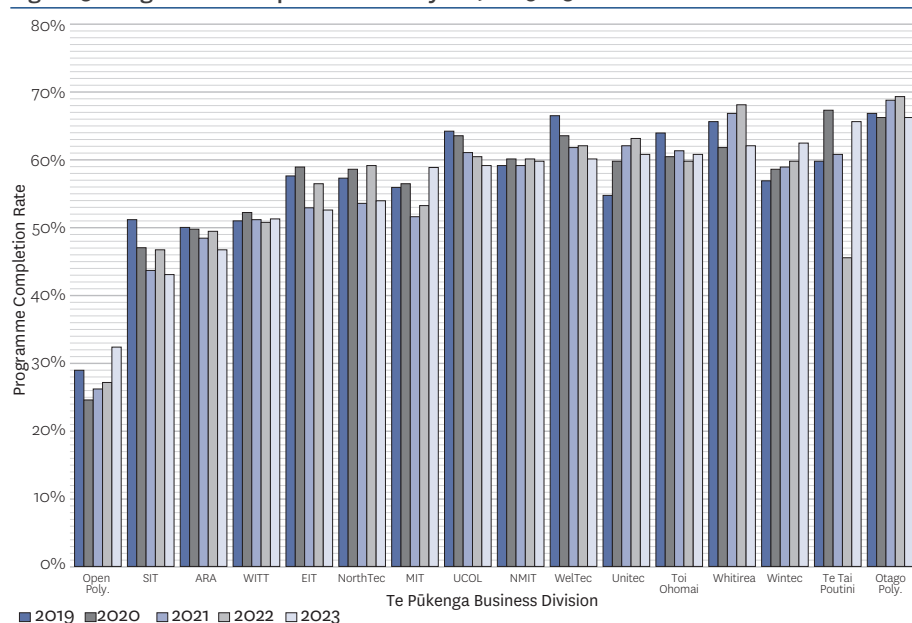
The slowness of progress towards a regionally empowered model has been worrisome. Te Pūkenga has remained operational for two years post-election, retaining operational powers across the sector until 2026. Until recently, centralised decisions, with major cost-cutting and a reduction of options

have provided local guidance to Te Pūkenga viability reviews, mitigating ill-informed cuts and assisting with community-based solutions in areas where marginally viable programmes may have been salvageable and joined-up solutions may have been identified.

Fragmented and inadequate funding

January 2023 saw the introduction of a new, unified funding system for the vocational education sector (Tertiary Education Commission, 2024c). This unified funding for NZQA study from level 3 to level 7 (non-degree) only, and is based on the number of students in a class. Funding does not consider the actual cost of delivery in different contexts. The number of students in a class and thus income received funds not just the cost of delivery, but also the support and infrastructure to

Figure 3: Programme completion rates by ITP, 2019–23



Source: Tertiary Education Commission, 2024b

enable delivery, irrespective of geography. Regional delivery incurs higher delivery costs than main campuses. Viability is linked to scale (Smyth, 2024), and regional campuses lack economies of scale.

In a country of fewer than 5.5 million, a whole-of-government focus is sorely needed. Total government spending for higher education activities is currently spread across several agencies, with appropriations in Vote Tertiary Education (funding for tertiary education institutions), Vote Social Development (student allowances and student loan payments), Vote Revenue (the final-year fees free policy, and fair-value write-down on the student loan asset), and Vote Business, Science and Innovation (research-related funding). Total government expenditure is reported each year in the half-year and annual fiscal updates and estimates appropriation data.

In addition to these allocations, our team have identified education spends via health, immigration, corrections and other entities and found it difficult to accurately identify total spend. Of note, 2024 Official Information Act requests identified significant funding flows via the Ministry of Social Development to 1,579 private providers in receipt of 2,856 contracts, with a significant number providing skills development programmes (Ministry of Social Development, 2024b, 2024d). For example, \$4,927,000 was paid to a private provider to develop curricula for health support workers (Ministry of Social

Development, 2024c), even though such curricula already exist within the Te Pūkenga network; \$25 million was paid to Career Force to support growth in the number of health support workers, and a total of \$655 million via the apprenticeship boost scheme between 2020 and 2024 (Ministry of Social Development, 2024b, 2024c). Significant expenditure of \$52.3 million was also identified to Te Whatu Ora (Te Whatu Ora, 2024b, 2025).

Identified payments suggest significant sector fragmentation, with little apparent strategic cross-government collaboration, a point of concern given that local divisions of the nationally critical, state-owned provider (Te Pūkenga) were concurrently operating in deficit and with underutilised capacity. The quality of this spend is also far from certain: when asked to provide the evaluation framework guiding contracting and funding decisions, the Ministry of Social Development responded that performance indicators and/or outcome measures relate to specific contracts, most frequently agreed at a regional level, and no clear answer was possible in respect to overall outcomes (Ministry of Social Development, 2024c).

Discussions related to funding fragmentation and calls for better alignment are not new (Productivity Commission, 2017) and are key to the intent of the RoVE reforms and establishment of Te Pūkenga. The issue is also seen in the Frontiers Firms review

(2021) and follow-up review (2023), which discussed the impact of fragmented science and research funding, the need better for investment in the workforce and improved connection with industry (Productivity Commission, 2021b, 2023). The need to address fragmented funding systems is also noted across the Tasman, where research funding systems and complicated rules are being simplified on the basis that fragmentation is holding back national development and innovation (Universities Australia, 2025). Funds held across different agencies with common interests is not necessarily a problem, but issues certainly arise when silos become embedded and effective whole-of-government oversight and collaboration is missing (Scott and Gong, 2021).

Educational deserts and suboptimal results from distance learning provision

Educational deserts emerge if services are overly centralised rather than being delivered regionally (Brownie et al., 2024). Online or distance education may seem to be a plausible option; however, it is not a panacea. International research has shown that distance learning via virtual classrooms consistently delivers significantly lower course-completion outcomes than face-to-face or blended models (Bettinger et al., 2017). Analysis of New Zealand outcomes data supports this assertion, showing the Open Polytechnic to consistently experience the lowest course-completion rates (Figure 3). Over-reliance on online delivery to the detriment of accessible face-to-face learning opportunities increases the risk of further embedding existing inequalities for regional learners.

Multiple competitors

The viability of tertiary education organisations is closely linked to scale (Smyth, 2024), with the critical point difficult to reach in New Zealand given low barriers to entry and the number of competing providers. Analysis of information released by Te Pūkenga, the Ministry of Social Development and other government entities highlights a crowded market with a high, and perhaps unsustainable, level of competition. Market share information released by Te Pūkenga

(Te Pūkenga, 2024a) details the number of tertiary education organisations operating in the three regions of interest to this study (see Table 1).

In response to this data, Rob Heyes, lead economist at Informatics, reasonably asks whether New Zealand needs so many providers given its small population (Heyes, 2024). Heyes’ analysis shows surprisingly small regional population sizes per local tertiary education organisation (Table 1), and asks whether a given regional ITP would have a better chance of turning a profit if it were able to increase the scale of its operations by taking on learners currently serviced by others operating locally. He also notes wide variation in this measure across regions – for example, as low as one tertiary education organisation per 1,274 people on the West Coast – suggesting that this shows a lack of standardisation in how tertiary education is delivered regionally.

Ministry of Education data shows that within this competitive market, student enrolments in tertiary education nationally rose by 2.3% in 2023, but the distribution between competing providers shifted markedly. Wānanga enrolments rose by 4.3% and PTE (private training establishment) enrolments by 22%, while Te Pūkenga enrolment fell by 3.3%, with a 5.7% decline in domestic enrolments (Education Counts, 2023). This trend suggests declining learner confidence in Te Pūkenga, to the benefit of the private sector (i.e., PTEs). A response from the Tertiary Education Commission to an Official Information Act request about provider numbers suggests that it funds 298 PTEs (Tertiary Education Commission, 2024b), while Independent Tertiary Education New Zealand reports that in 2022, government-funded PTEs offered 1,665 different programmes contributing to 800 qualifications for 52,440 enrolled learners (Independent Tertiary Education New Zealand, 2024). The extent of private sector provision relative to other providers is illustrated in Figure 4.

We consider that it is worth considering how appropriate it is that the government focuses attention on cost-reduction and asset stripping primarily in the state-owned vocational education sector (i.e., Te Pūkenga), which at this point holds only 15–20% of the tertiary education market

Table 1: Market share of tertiary education organisations (TEOs), 2023

Region	Regional Population	Number of TEOs	Regional population per TEO	Learners % of regional population	Te Pūkenga market share
Northland	203,900	66	3,064	3.3%	21%
Bay of Plenty	354,100	73	4,790	4.1%	25%
Waikato	522,600	88	5,964	4.4%	21%

Source: Heyes, 2024

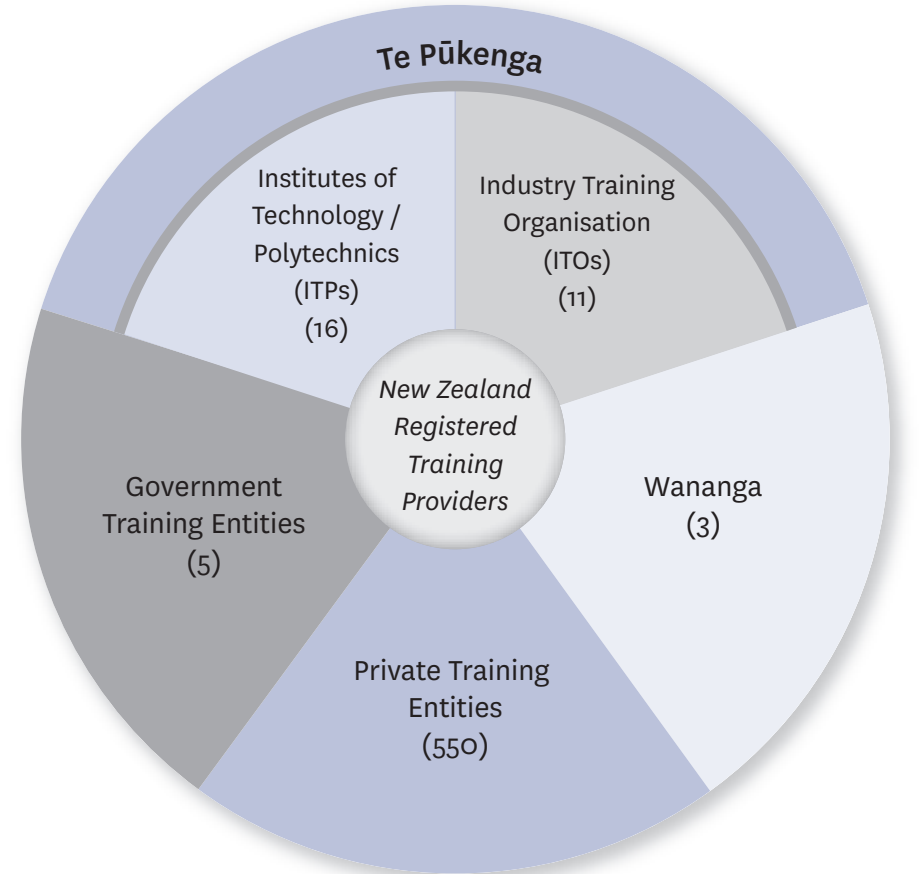
share (Te Pūkenga, 2024a), while ignoring large-scale shifts to highly fragmented private sector provision. A major driver of the RoVE reforms centred on the administrative costs and inefficiency across 16 ITPs and 11 ITOs, while simultaneously establishing workforce development councils and regional strategic leadership groups. However, seemingly no attention has been given to the heavy administrative burden and size of back-office teams needed to engage with this number of providers and effectively link ITPs, ITOs and the new workforce development councils and regional strategic leadership groups. We note here that effective monitoring and quality control across multiple smaller-scale private providers is

almost impossible, as seen in the UK where many acknowledge that the system has gone too far with privatisation (Naz, 2024).

Data inconsistencies

Accurate and timely data is essential for effective planning across government services (Brownie and Broman, 2024; Brownie et al., 2014). In preparing this article, the authors reviewed publicly available data and requested a large amount of information from agencies. Inability to reconcile data, contradictory responses from agencies, and incomplete and non-matching data sets were consistent issues. Examples of incomplete data sets include a Ministry of Social Development response to a question about expenditure specific to

Figure 4: Number of registered training providers in the New Zealand vocational



Source: Skills Consulting Group, 2020

Table 2: Costs incurred by Te Whatu Ora for recruitment and education of internationally qualified nurses, March 2023–July 2024

Activity	Cost
CAP fees reimbursements	
• March 2023–March 2024 (3350 IQNs)	\$26,543,562.36
• April 2024–July 2024 (935 IQNs)	\$7,649,450.79
Additional staff costs to process re-imbursements	\$141,576.70
Staff attendance at international recruitment fairs	
• 9 staff - Intensive Care Congress UK	\$62,110.63
• 4 staff UK – Critical Care Association UK	\$27,432.74
• 6 staff UK – London Careers Fair UK	\$34,985.05
• 2 staff Scotland – Glasgow Nursing Fair	\$7,684.01
• Birmingham Down Under Live, United Kingdom (14 October 2023)	Cost info refused
• Dublin Down Under Live, United Kingdom (18 October 2023)	Cost info refused
• London Down Under Live, United Kingdom (21 October 2023)	Cost info refused
• Melbourne HealthCare Job Fair, Australia (16 March 2024)	Cost info refused
• Brisbane ANZICS Conference, Australia (10–12 April 2024)	Cost info refused
• Sydney ICU Critical Care Health NZ Job Fair, Australia (8–9 May 2024)	Cost info refused
Recruitment Agents Fees	\$17,827,053.00
Total	\$52,293,855.28

Source: Te Whatu Ora 2024b, 2024c

the Northland, Bay of Plenty and Waikato regions which stated that ‘The Ministry is unable to provide expenditure data by region’ (Ministry of Social Development, 2024c). A question to Te Whatu Ora regarding the amount of revenue received from educational providers for clinical placements received the following reply:

We have identified a gap in our knowledge and the lack of national visibility of placement revenue and are working to better standardise and collect this information in a systematic way across Health NZ to enable us to make this data available in the future. (Te Whatu Ora, 2025)

Other examples include the authors’ failed attempt to confirm the whole-of-government total spend on tertiary education: questions submitted to Treasury were transferred to the Ministry of Education, with resubmitted questions either misunderstood, refused under various provisions of the Act (Treasury, 2025), or transferred for a second and third time. We consider that there is no single source of truth across available data and that the difficulty is a longstanding one (Brownie and Broman, 2024; Ministry of Health, 2016; North and Hughes, 2006).

Policy disparities and disconnects

Policy disconnects are apparent across New Zealand’s government entities.

One example is the recent over-recruitment of internationally qualified nurses. New Zealand has a long history of underinvestment in its domestic nursing pipeline and heavy reliance on international recruitment: prior to the Covid-19 pandemic, New Zealand reported among the highest percentage of internationally qualified nurses (27.25%) in the world (World Health Organization, 2020). With the pandemic having disrupted usual inward migration, health bodies invoked various rapid-response strategies to address post-pandemic shortages. Migration settings were loosened, with nurses moved to a tier 1 ‘straight to residency’ pathway (OET, 2023), and Te Whatu Ora established a fund for new internationally qualified nurses to have their competency assessment programme (CAP) fees refunded (Nursing Council of New Zealand, 2023). Simultaneously, many New Zealanders sought to retrain, especially those whose existing jobs had been affected by the pandemic. In contrast to new internationally qualified nurses, people entering a two-year graduate-entry programme to become a registered nurse found very limited support. Students in these programmes face two years without government-supported income (but may borrow to cover living costs within the student loan scheme), and are required to pay hefty fees of around \$8,000 per annum.² Student loans of \$40–50,000 on graduation are a common scenario.

Predictably, internationally qualified nurses flocked to New Zealand, attracted by the promises of jobs accompanied by immediate tier 1 residency and refund of CAP fees: 18,843 internationally qualified nurses obtained a New Zealand licence in the year to September 2024 (Nursing Council of New Zealand, 2024), constituting 86% of all new registrations and approximately ten times the annual volume of domestic graduates. These nurses now constitute 46.3% of the 83,951 nurses holding an annual practicing certificate. Facilitating this unprecedented level of international recruitment into the country cost almost \$52.3 million between March 2023 and July 2024 alone (see Table 2).

The policy incongruities in this scenario are obvious. Extraordinarily, the \$52.3 million spent by a single agency on this single issue exceeds Te Pūkenga’s remaining deficit, which New Zealand’s central vocational education and training delivery agency is yet to fully resolve (Te Pūkenga, 2024b). Actions undertaken by health agencies arguably ran counter to government priorities in education and have caused a major oversupply of nurses and a situation in which both internationally qualified nurses and domestic graduates are unemployed and financially distressed (Brownie and Jackson, 2024). Worse, the investment in international recruitment and education seems to have yielded very limited long-term return, with the Nursing Council of New Zealand reporting that 45.5% internationally qualified nurses declared a New Zealand residential address in December 2023, dropping to 22.2% in September 2024 (Nursing Council of New Zealand, 2024), and recent research showing an almost total loss of internationally qualified nurses within 30 months (Ram et al., 2025). Meanwhile, the cost of domestically qualified graduates either in receipt of jobseeker support, leaving nursing or leaving the country is yet to be calculated.

Complexity, lack of clear governance structures and suboptimal outcomes

All this points to insufficient cross-government collaboration, missing and non-matching data, and a complex, tangled ball of policy and funding disconnect.

Siloed portfolios, competition and funding fragmentation in an extensively crowded market are evident, along with an absence of clear whole-of-government coordination. The scale of unfettered competition between and within government-owned entities and between the public and private sectors are illustrative of a floundering system in which data matching and programme evaluation are exceptionally difficult, and in which multiple providers struggle for viability as they compete for money within a limited funding pool. Given the discovery of significant spending allocations across the various government agencies (see Table 2), we suspect that there may well be sufficient funds across existing vote allocations to sufficiently fund an effective and sustainable tertiary education for New Zealand's domestic learners. Our low domestic skill levels and reliance on inward migration show an urgent need for policy improvements and for a whole-of government approach and coordination across the currently highly fragmented system

Policy solutions

The documented link between the population skill base, regional productivity and economic well-being is well-known (Productivity Commission, 2024; Radcliffe, 2024; Wesselbaum, 2024). Economic productivity rises as the number of educated and skilled workers increases, and economies are more productive when embedded disparities are effectively addressed (UNESCO, 2024). Lifting productivity in New Zealand's fastest-growing regions requires a focus on those not currently in education, training and employment and those facing geographic, cultural and socio-economic barriers. A well-functioning tertiary education system which supports domestic skills development is critical in improving social and economic performance.

International examples of good practice

Global best-practice examples are clustered in Europe, with many people pointing to the success of the vocational education and training system in Germany, Austria, Switzerland and Liechtenstein. In differing ways, each is a global leader in vocational education, work-based training and entry to work (employability) and often referred

to as illustrative of a 'gold standard' in 'career-connected learning' (European Centre for the Development of Vocational Training, 2025). As an example, vocational education and training is so attractive in Sweden that 60% of 15–19-year-olds choose to go through this pathway: vocational qualifications enable them to secure lucrative graduate employment opportunities while continuing to obtain bachelor's and master's level qualifications via collaboratively connected universities (Phillips, 2023).

Tertiary education in Slovenia features a fully integrated education system across high school, vocational education and training and university. The system also features implementation of a major development project involving a skills forecasting platform. The platform

imperative to further enhance cross-sector collaboration (and reduce competition) has also been well-recognised in current policy directives in the Australian Universities Accord (Nous Group, 2023) and the establishment of collaborative and institutionally agnostic learning hubs in regional areas (Australian Government, 2024). Further collaboration is seen in Australia in the 'TAFE at School' initiatives (Victorian Government, 2025); and in New Zealand in the successful 'trade academy' model, where students spend some days at school and some days at work each week (Ministry of Education, 2025).

Best-practice features

These industry-connected systems have consistent features. They include well-

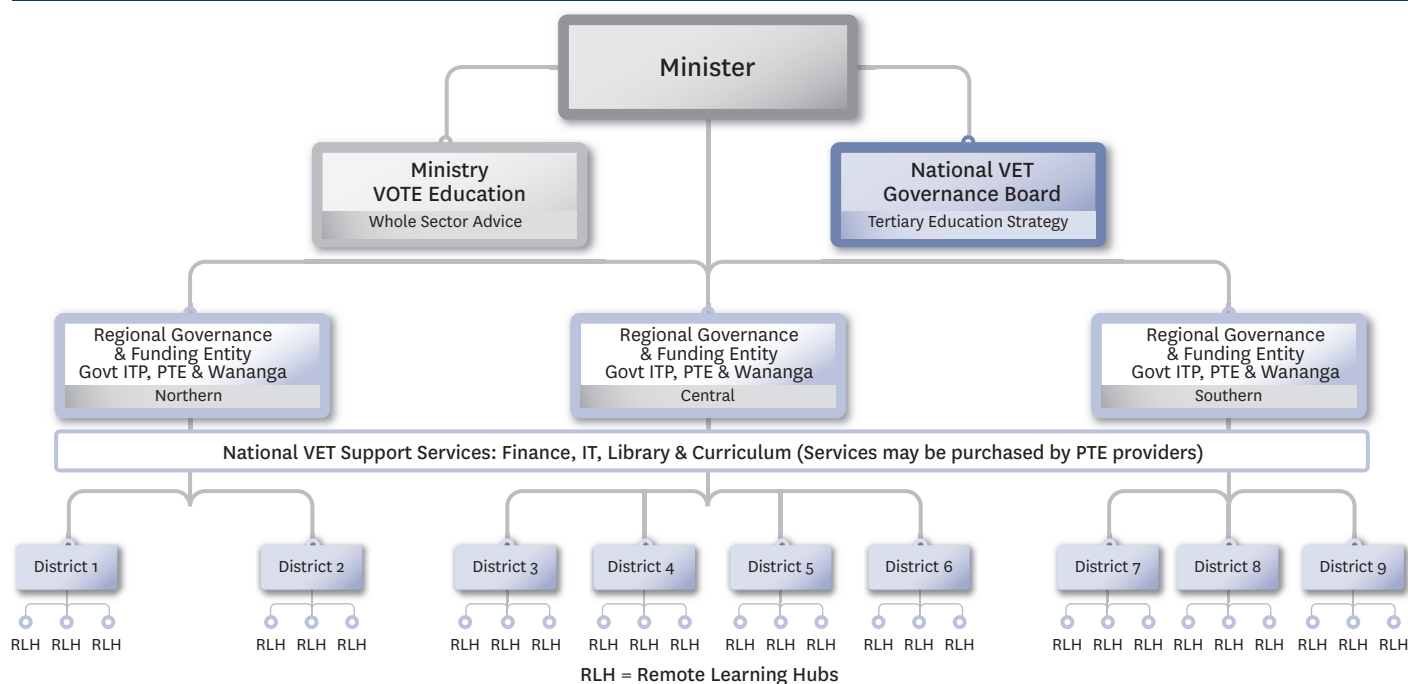
Multi-level governance models with priority and commitment for research and innovation and a focus on equitable domestic skills development are highlighted as features of excellence in educational systems design ...

identifies short-, medium- and long-term competency gaps in the labour market and predicts skill needs based on the information obtained. The platform development models cross-government collaboration through partnership with the Ministry of Labour, Family, Social Affairs and Equal Opportunities (Cedefop, 2021). The commonality of these European-based systems involves roots in a centuries-old guild system of work-based learning which is deeply embedded within the culture of those countries. Collaboration is also evident between the vocational education and training and university sectors.

Collaborative models are also seen in the Australian context, with five 'dual-sector' university/vocational education (TAFE) providers established following the 2009–11 Dual-Sector Collaboration Project (Matthews and Murphy, 2011). The

defined multi-level governance systems with coordinated cross-government structures which encourage collaboration, along with a strong focus on domestic learners, with every learner positioned as a contributor to the health and well-being of the country. Industry engagement is consistently present, along with extensive interaction and localised delivery. Public versus private sector provision is purposefully managed and balanced. Systems are student-centred, with accessible place-based work-integrated learning and clear pathways across the entire education spectrum, particularly from school through higher education to employment. Leading-edge infrastructure supports learning for all key industries, with infrastructure increasingly provided via cost-effective collaborative hub models. Adequate investment with appropriate,

Figure 5: Multi-level vocational education governance and delivery model



needs-based financing is aligned with the specific needs of industry employers. Educationally experienced leadership is present in key roles.

Governance

Multi-level governance models with priority and commitment for research and innovation and a focus on equitable domestic skills development are highlighted as features of excellence in educational systems design (OECD, 2024). National governance boards provide whole-of-government guidance and strategic direction. Locally empowered governance ensures strong industry engagement and a focus on local skill requirements. Regionally-based funding and purchasing entities bring purchase decisions closer to regions, in contrast to New Zealand's current Wellington-centric funding model. Figure 5 models how this could be designed within the New Zealand context: the various levels of governance would bring funding decisions closer to regions and would ensure appropriate representation and voice of both iwi/Māori and the wider community at all levels.

Regional empowerment

A multi-level governance framework as proposed, with three regional governance and funding entities aligned with existing Ministry of Education regions, would bring

consultation and funding-related decision making closer to regions (Figures 5 and 6).³ Alignment with the existing Ministry of Education regions could reduce sector fragmentation and maximise functional pathways and collaboration across early childhood, primary, secondary and tertiary education, while minimising confusing reporting jurisdictions.

Establishment of three regional governance and funding entities is consistent with the model proposed for the health sector (Reti, 2024). The health minister's announcement in 2024 pointed to the benefits of local leadership and accountability, providing authority to allocate resources to improve outcomes and deliver against targets (MySkill, 2024). Funding decisions must not be overly centralised, without ability to identify and address local industry and community needs. Further, a system in which each region is configured to maximise the ease of establishing collaborative arrangements and learner pathways with university providers is key to regional empowerment. Rationalisation and strategic alignment are also needed across the multitude of private sector providers, a process more able to be handled on a regional basis.

Financing – money matters

Access to vocational education in the regions is critical for local skills development,

healthy communities, productivity and national GDP (Benavides et al., 2012; Holden and Zhang, 2018). However, New Zealand is reported to be underinvesting in tertiary-level education and not delivering it where needed. Delivering education into regions is often more costly than urban areas. Therefore, needs-based funding provisions with funding decisions made closer to the regions is critical to success. The historic Australian-based Gonski review detailed the necessity of needs-based funding across the entire education system (Gonski et al., 2011) to address gaps between the highest and lowest achievers across the nation's education systems. Gonski's recommendations were in line with the OECD's historically consistent message that effectively addressing disadvantage requires increased investment in educational systems (Benavides et al., 2012). However, successive governments failed to establish the policy and fundings settings needed to bring Gonski's needs-based funding recommendations to life and so Australia has had to revisit reform processes (Kelsey-Sugg, 2022; Nous Group, 2023).

In 2021 the Nobel Prize in economic sciences was awarded jointly to David Card for his 'empirical contributions to labour economics', and Joshua Angrist and Guido Imbens for their 'methodological research contributions to the analysis of causal

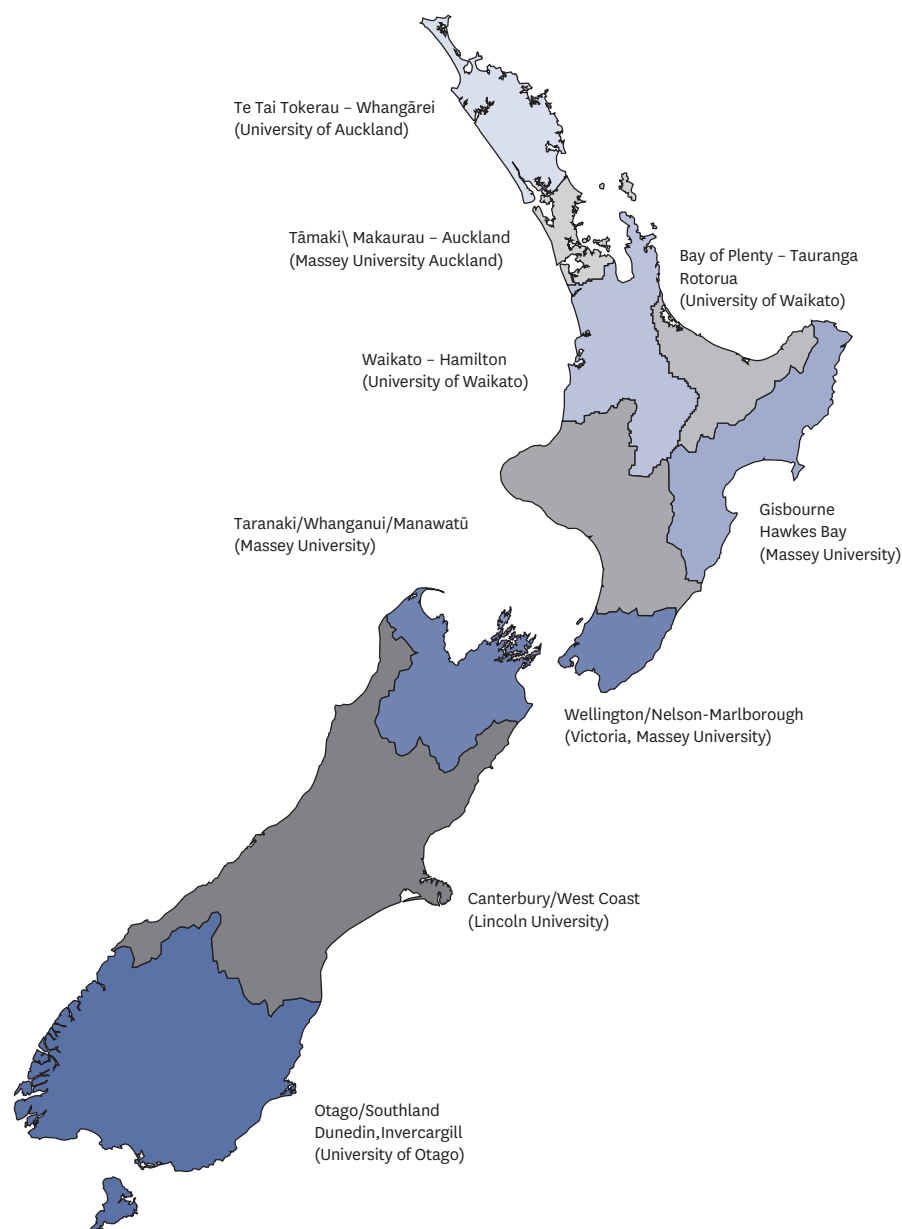
relationships' within labour markets (Nobel Prize Organization, 2021). Their combined efforts confirmed the finding that levels of investment in education have a direct influence on educational outcomes, including students' entry to and later success in the labour market (Sahlberg and Piccoli, 2022). Card, Angrist and Imbens provide overwhelming evidence that money matters a great deal in education, and that the causal relationship between education expenditure and student achievement is very strong, especially for disadvantaged and marginalised students.

Hope for the future

While the status quo may be gloomy, early indications give rise to hope that the new coalition government understands the issues and is attempting to reset policy and direction. For example, the Social Investment Agency has a mandate to resolve longstanding issues and is designed to work across agencies to achieve rigorous, consistent and systematic collection and use of data. Whole-of-government coordination of data is intended to provide an improved evidence base on which investment decisions can be made earlier and with better effect. Early identification and clearer understanding of current investment and the drivers of poor outcomes will allow for earlier investment in 'what works' (Treasury, 2024). While more work is needed, New Zealand has models which have proven to be effective – for example, the 'trades academy' model (Gerritsen, 2025). Places are currently rationed and many students miss out on this opportunity, but potential exists to contextualise and systemise the approach, as seen in Europe.

Positive signals are present in the coalition government's 'Going for Growth' strategy, with 'developing talent' listed as the first of five pillars supporting economic recovery and growth (Ministry of Business, Innovation and Employment, 2025). The government has also released an Employment Action Plan (New Zealand Government, 2024), a cross-government plan with the key players being the Ministry of Social Development, Ministry of Education, the Tertiary Education Commission and the Ministry of Business, Innovation and Employment. The plan is built around collaboration between

Figure 6: Proposal for whole-of-tertiary education alignment across regions



agencies, along with partnership-based commitments to industry, regions and communities.

Encouragingly, national health workforce planning has been identified as providing the greatest opportunity to improve the New Zealand healthcare system, and commitment to improved workforce planning is increasingly apparent. A New Zealand Health Workforce Plan has been developed for 2024, with encouraging content regarding better support for growth in the domestic workforce and the provision of facilities such as simulation centres, and a focus on interprofessional teams and telehealth delivery (Te Whatu Ora, 2024a). These are much needed developments.

In establishing these entities and signalling improved governance over key decisions, the current government understands that overly centralised models, siloed approaches and data misalignment issues have got in the way of effectively targeting expenditure. However, the introduction of a siloed ministerial appointment for universities does not bode well, as it is unclear at this point what mechanisms are in place to ensure collaboration and clear learner pathways. Greater articulation is needed in respect to the cross-sector engagement with education, immigration, regulatory authorities and others on which successful planning outcomes depend (Te Whatu Ora, 2024d). Recent news of possible dual-sector

(university/vocational education) provision, while greeted with scepticism by some (RNZ, 2025), is, in our view, encouraging, with useful examples seen in other jurisdictions, including Australia (Moodie, 2009).

The telling point will be whether culture can be changed within and between large government agencies so that genuine cross-government collaboration can occur. In addition, the complex issue of increased privatisation versus government-funded delivery must be openly examined and occur under deliberate policy direction rather than through free market proliferation alone. Well-coordinated and

regions, such South Auckland. The focus is on the vocational education and training sector only, and it is acknowledged that similar fragmentation could be identified across New Zealand's higher education university sector.

Policy implications

The work associated with this study has highlighted an unsustainable level of fragmentation and complexity across the existing vocational education and training system. Given the limitations outlined above, accurate evaluation is beyond the capacity of interested researchers and policy advisors alone. Lifting productivity

Agency, including better understanding and streamlining of current funding flows across the higher education sectors;

- strengthening whole-of-system governance, regional voice, partnership with iwi/Māori, and industry participation across the vocational and higher education system to
 - address and resolve issues of sector fragmentation;
 - establish clear learner pathways and ensure the development of domestic workforce capability aligned with both industry and regional need.

A strategically governed, joined-up system committed to the pursuit of shared aims is urgently required if New Zealand is to effectively upskill its population and achieve the productivity gains needed to lift economic performance.

Conclusion

The strong causal relationship between the level of investment in education and student achievement and skills development, especially for disadvantaged and marginalised students, is well known. Equally well known is the negative impact of factors such as socio-economic status, welfare spend, health status, crime and economic growth on inequalities in educational access (Brookes, 2023). As such, it is critical that strategically cohesive, whole-of-government mechanisms are in place to effectively support skills development across New Zealand's domestic workforce. This has been acknowledged by successive governments, yet policy settings continue to undermine the plan (Doe, 2025). New Zealand continues to take a 'free rider' approach, poaching skilled people from other countries without regionally equitable attention to the skills development and employment of New Zealanders.

The current vocational education system, characterised by sector fragmentation, gaps in national and regional governance, a centralised funding model, siloed departmental actions, unfettered competition, and an over-reliance on an internationally qualified workforce is not a recipe for lifting national productivity. A strategically governed, joined-up system committed to the pursuit of shared aims is urgently required if New Zealand is to effectively upskill its population and achieve the productivity gains needed to lift economic performance. Our investigations highlight that, to do

carefully constructed public policy is central to success (Miller and Pradeep, 2024). However, policy resets are commonly derailed and policy implementation failure is common. New Zealand is not immune to this risk, with the RoVE failures being a textbook example. With so much at stake, how will the future story be different for the talent and potential within New Zealand's fastest-growing regions?

Limitations of this study

This study has been limited to publicly available data and information obtained through Official Information Act requests. These limitations were compounded by the known data gaps, along with significant delays and difficulties in obtaining clear answers via OIA request. The study focuses on Northland, Waikato and the Bay of Plenty, regions with high population growth and where the authors work and reside. The authors acknowledge that similar issues exist in other high-growth

is a major focus of the current government. With education being a major 'transmission channel between inequality and growth' (Benavides et al., 2012; Cerra, Lama and Loayza, 2024; Holden and Zhang, 2018; Productivity Commission, 2024), our recommendation is that priority be given to:

- strengthening access to vocational education provision for the nation's domestic workforce;
- ensuring collaboration across the three ministerial portfolios of education, vocational education and universities, with recognition of the 'unique' characteristics of universities and other degree-level providers in respect to academic independence and research functions;
- prioritising analysis of current whole-of-government investment in vocational education and training and broader tertiary education within the work schedule of the Social Investment

better, attention must be paid to strong multi-level governance, clear regional voice and cross-sector collaboration which recognises the importance of place (Ram et al., 2025) and successful learning outcomes. Needs-based funding and industry alignment for domestic learners are critical in lifting national productivity and mitigating current inequities. While hope glimmers within revised policy

directions and newly established cross-agency functions, cohesive, long-term whole-of-government planning with non-fragmented investment is yet to be achieved.

¹ The tertiary education ministerial portfolio was divided in January 2025, with separate roles for a minister of vocational education and minister for universities. Separation carries the risk of increasing silo effects, as does a current strategic review of universities being undertaken separately from work on the future configuration of the vocational education sector. At the time of writing (February 2025), it was not clear which minister was for responsible boundary-crossing areas such as degree-based study,

the performance-based research fund (PBRF) and wananga.
² Policy disconnects are evident in that graduate-entry master's students are not eligible for financial support, as student allowances are not available for postgraduate study. They are also ineligible for jobseeker support while studying.
³ Note here that the Education and Training Act 2020 establishes a key function of the Tertiary Education Commission as being 'to facilitate and strengthen the connections between schools, employers, and tertiary education organisations to ensure that students are prepared for employment and further education or training, or both'. These connections plainly require close alignment with the compulsory schooling sector and Ministry of Education.

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