



**Industry
Skills
Boards**

Future network of work-based learning provision

Thank you for considering taking part in this survey.

The Industry Skills Boards (ISBs) are seeking feedback from employers and industry representatives to **help inform the future network of work-based learning provision**.

Work-based learning refers to formal training that combines learning and work, such as apprenticeships, traineeships, and other nationally recognised qualifications completed while in employment.

The **network of work-based learning provision** refers to the providers funded by the Tertiary Education Commission (TEC) to deliver training (e.g. polytechnics, wānanga, private training establishments, and former industry training organisations).

The purpose of this survey is to better understand what different industries need from the future network of work-based learning provision. This includes understanding what is important to employers and industry stakeholders, such as the types of providers available, the number of providers, their geographic coverage, and other features of the network.

The survey will help inform the TEC's decision-making about work-based learning provision and ISB advice and workforce-planning activities. Future arrangements may differ across industries to reflect different needs and contexts. The findings will be considered alongside other evidence and engagement activities.

This survey is not an evaluation of specific providers, programmes, or learners currently participating in training.

You will be asked about your organisation, your work-based learning needs, any challenges accessing work-based learning, and your views on the future network of work-based learning provision.

Participation in this survey is voluntary. Your responses will be kept confidential and reported in aggregate. Providing contact details is optional and will only be used if you agree to be contacted for follow-up questions. Further information about the survey is available in [the information sheet](#).

Please return your completed copy of this survey to julie@scarlatti.co.nz by 24 July 2026.

Section 1: About you and your organisation

This section asks a few questions about you, your organisation, and your relationship to work-based learning. This helps us identify which services or providers are relevant to your needs.

1.1 What kind of organisation are you replying on behalf of?

For example: Employer, self-employed, industry association, peak body or industry organisation, Tertiary Education Organization or training provider.

Industry organisation. The New Zealand Forest Owners Association/Forest Industry Contractors Association: Forestry Training Committee.

1.2 What is your role?

Joseph Brolly. Chief Operating Officer of the New Zealand Forest Owners Association and Secretariat for the FICA/NZFOA Forestry Training Committee.

1.3 Which industry(ies) are most relevant to the work-based learning needs of organisations you represent / your sector?

These may be different from your organisation's primary industry. Please think about the industries, occupations, or qualifications where work-based learning is most important for your workforce.

Commercial forestry.

1.4 What is the name of your organisation?

Forest Industry Contractors Association/ New Zealand Forest Owners Association - Forestry Training Committee – formed to provide strategic leadership of forestry training and provide clear feedback to government.

Section 2: Context

This section asks about the organisations or stakeholders you represent, current use of work-based learning in your industry or sector.

2.1 Approximately how many organisations, members, or stakeholders does your organisation represent or work with in your industry or sector?

An estimate is sufficient. You may also use the text box to explain your answer, including any assumptions, qualifiers, or relevant details about the organisations, members, or stakeholders you work with.

New Zealand's 1.81-million-hectare production forest estate employs over 8,500 people across the forestry supply chain, including silviculture, harvesting, engineering and forest management roles. Operational forest work is contracted out by forest owners to forestry contractors, who directly employ most of this workforce. The Forest Industry Contractors Association (FICA) represents forest harvesting and silviculture contractors.

These contractors are also responsible for training, assessment and pastoral care, supported by in-house capability. More than 85% of forestry training is work-based.

The New Zealand Forest Owners Association represents commercial plantation forest owners. Its members own more than two-thirds of New Zealand's production forest estate, covering over 1.2 million hectares, and account for more than 70% of the national harvest.

2.2 Is it common for organisations in your industry or sector to use work-based learning?

If so, please name the training provider(s) your industry or sector mainly engages with, or has visibility of.

Over 85% of forest harvesting and silviculture training happens on the job. Forestry has over a 90% formal training participation rate, the highest of any primary industry group. Forestry has a strong tradition of training every staff member working in harvesting and silviculture for their job role.

Vocational training is a critical tool for managing the health and safety risks on forestry worksites.

This is particularly true for high-risk roles such as felling, breaking out, and steep slope harvesting.

In forestry there is a strong link between workbased learning, safety, capability and productivity. In our industry, training is not simply about achieving qualifications, it is critical for enabling safe operations, improving operational efficiencies, and developing long term workforce capability.

2.3 Do you see any barriers to work-based learning in your industry or sector?

- Employers receive funding support for assessment, but not for the training itself. This is a significant barrier and reduces the number of people who can be trained and upskilled.
- Forestry employers and learners find it frustrating when funding rules and qualification packages do not reflect actual job roles or employer needs.
- Qualification packages and provider behaviour are often driven by the TEC funding system rather than what works best for industry, learners, and employers. For example, a worker may need training and assessment to operate a grapple excavator, but the employer may have to enrol them in an apprenticeship to access funding, even if the full apprenticeship is not required and is unlikely to be completed.
- Crews have become more specialised. Staff are less likely to rotate across a wide range of machines as they did in the past. Instead, they often stay on one or two machines and build deeper capability in those roles.
- Employers are frustrated by red tape and by systems that appear to assume an academic-style semester model. For example, a motivated learner may progress quickly through work-based qualifications during the year but be unable to continue because they have reached the annual credit limit.
- Employers meet most of the cost of training and assessment, so their requirements should be properly reflected in the system. Providers need a stronger customer-service focus and should be more responsive to employer and learner needs.
- Training needs to evolve to include a stronger focus on improving productivity outcomes. There is significant opportunity to enhance machine operator training to help achieve an additional 10–20% improvement in production from expensive and increasingly sophisticated machinery. The return on investment from this type of training would be substantial, both for individual businesses and the wider forestry

sector. Improving workforce capability in this way aligns strongly with the Government's ambition to double exports and the broader national focus on lifting productivity.

- Some of the well-intentioned changes being driven by the Tertiary Education Commission (TEC), NZQA, and requirements designed to accommodate the needs of other primary industries are not well suited to forestry and could expose our staff to heightened or unnecessary risk.

For example, forestry strongly supports retaining the unit standards and qualifications developed over many years for harvesting and silviculture. These specialist unit standards, and the associated course materials, reflect decades of practical industry knowledge and have been refined over time.

We do not support replacing them with broader skills standards designed for lower-risk industries, or with generic primary industry qualifications. Doing so would reduce the level of detail provided to learners, weaken training quality, and, most importantly, reduce safety outcomes and expose our people to unnecessary risk.

If your industry or sector does not use/ has not used work-based learning, please skip to Section 4.

2.4 What is working well about the current work-based learning system?

On-job training works well in forestry because skills are taught/assessed in the same environment where they are applied. This gives learners practical experience in the roles they are being trained for and helps prepare them for real forestry worksites.

The national network of roving trainers and assessors has been effective because it allows forestry workers to be trained and assessed on site by people with deep understanding of the industry who understand the culture of forestry well. These assessors understand the needs of diverse learners, including people with dyslexia or low written literacy, and can support them in a practical workplace setting.

The course materials and qualifications developed in partnership with industry over the decades are well suited to this model. For many forestry workers, work-based training may be their first formal learning achievement, making it an important pathway for confidence, capability and progression.

The unit standards and course materials developed in partnership with our industry work well in practice. Our committee can assist with the next qualifications review process in 2027 to ensure the process is well aligned with industry.

Section 3: Provider network preferences for industries that currently use work-based learning

If your industry or sector does not engage with work-based learning, please skip to Section 4.

This section asks about your preferences for the future network of work-based learning provision. There is no right or wrong answer. Please consider what would best meet the future work-based learning needs of your industry or sector when answering these questions.

3.1 How would you prefer work-based learning providers to be organised in future? Please explain your preferences.

Consider if there should be one main provider or more than one provider to choose from. Consider factors such as consistency, choice, competition, access to expertise, responsiveness, and ease of navigating the system.

Consider if there should be specialist provider(s) focused on specific industry, occupation or qualification area; provider(s) covering a broader cluster or sector of related industries and occupations; a mix of specialist and broader providers. Consider factors such as industry expertise, responsiveness, consistency, transferability of skills, and choice.

We recommend one main provider for each different level/function of forestry training such as pre-entry training, on-job training, advanced trades/machine operation, and management or supervisory training.

Providers should be forestry specialists or have at least have a dedicated forestry division with clear accountability to industry.

Our preference with would be inclined towards a national provider at each level for efficiency and ease of coordination. It's important for industry to be able to link the different parts of the system (providers) together easily.

For example, the pre-entry provider should have a clear link with the on-job training provider. Our committee can provide industry feedback and ensure providers stay aligned with the needs and expectations of our workforce.

3.2 How should work-based learning provision be organised geographically in future? Please explain your preferences.

Consider if there should be national coverage from provider(s) able to serve the whole country; regional or local provider coverage; a mix of national and regional / local provision.

Consider factors such as local knowledge, access, consistency, responsiveness, and coverage.

Generally a national provider is preferred for efficiency, ease of interaction, coordination and scale. For example it makes sense to have one work based training provider for on job harvesting/silviculture training throughout the country vs 12 different regional providers for employers and learners to interact with.

However, there should be options for regional provision to cater to local requirements where it makes sense. It depends on the skills being taught. For example machine operator schools in both north and south island locations.

It is important to avoid a situation where multiple providers compete to enrol the same learners. In forestry, a single national provider is more likely to deliver better outcomes than multiple weak providers.

Where multiple providers compete, they tend to focus on high-volume, lower-cost programmes that are the most commercially attractive. This leaves low-volume, higher-cost qualifications under-served. That model is poorly suited to the forestry sector, where training demand is dispersed, learner numbers are relatively low, and delivery costs are high.

A single national provider can offer a comprehensive suite of forestry qualifications, using the scale of the overall programme to support the delivery of specialist and lower-volume training that may not be commercially viable in a fragmented multi provider network.

3.3 Which types of provider would you prefer deliver work-based learning in future? Please explain your preferences.

For example: specialist work-based learning providers only; polytechnics and/ or wānanga only; a mix of providers.

Consider factors such as industry expertise, educational capability, responsiveness, quality, and choice.

Specialist work based training providers with close relationships with forestry preferred. Ideally industry owned. The current national work-based learning provider has a strong relationship with forestry and strong support from industry. Important for providers to understand forest industry requirements.

Polytechs or Wananga may have a role in pre-entry and higher level learning. Useful for vocational training to also have a link with the Level 6 Diploma in Forest Management course – currently operated by a forestry based PTE.

A better-resourced Machine Operator School would help lift harvesting productivity. The existing Machine Operator PTE in Balclutha is highly regarded by industry. The programme should be expanded to include advanced machine operator training and a North Island location, which would support new entrants and improve sector productivity.

3.4 Which specific learner group(s) would you want work-based learning providers to support in future? Please explain your preferences.

Consider whether there are any learner groups that may benefit from additional support to successfully access, participate in, or complete work-based learning. For example, school leavers or youth, Māori learners, Pacific learners, Disabled learners, learners entering training with low prior educational achievement.

New entrants to forestry need more support than existing employees. Priority should be given to helping young New Zealanders enter the industry and move into suitable job roles, rather than relying on migrant labour as a short-term solution.

Forest harvesting has changed significantly over the past decade. More than 85% of harvesting roles now involve operating sophisticated machinery, compared with about 40% ten years ago. This makes it harder for new entrants to get started, as machine operation

skills are now often required. More investment is needed in machine operation schools to help new entrants build core skills, and in advanced training to help existing operators deepen their skills and improve productivity.

3.5 What else would need to change for work-based learning to better meet your industry, or sector's needs?

Work based learning needs to become more customers service focussed – ie what's required by learners and employers. Currently, too much emphasis is placed on TEC funding requirements and what works best for providers and government agencies.

How courses and qualification packages are funded needs more attention. It would be helpful if funding and qualification packages aligned better with the tasks/jobs that employers are training their workers to perform.

Our industry has a culture of training for job roles. This is becoming even stronger now as roles become more specialised with workers developing deep expertise in one area, eg driving a processor on the landing, or driving a tethered feller buncher on steep slopes.

More focus on productivity and excellence would be helpful - how to achieve more production with less breakages and lower running costs. This is possible with the right training input. Deeper training of advanced skills, and machine operation skills in particular, would improve industry productivity and assist with export and GDP growth.

More flexible funding and qualification packages would be helpful.

It would be helpful if the speed and timing of delivery improved. Eg get the training organised and delivered quickly for learners who are motivated or where the work needs to align with planting seasons etc.

Preventing learners from achieving additional qualifications because they have “maxed out” the number of funded credits available in a year does not make sense.

Forest harvesting operates year-round and is not structured around semesters. Silviculture is more seasonal and aligns with planting cycles. Funding availability should better reflect the operational realities and workforce needs of the industry.

Consistent funding is also needed for the Level 6 Diploma in Forest Management programme, which helps build a pipeline of entry-level forest management staff.

3.6 Is there anything else you would like to tell us about work-based learning or the future network of work-based learning provision?

Our FICA/FOA Forestry Training Committee would like to be involved in the detailed design of the network of provision. We would welcome the opportunity to be involved in a design workshop or similar engagement process to ensure that training is fit for purpose and that funds allocated for forestry training are being used effectively.

Section 4: Provider network preferences for those industries not engaging with work-based learning

If you have completed section 3 because your industry or sector is engaging with work-based learning – please skip to section 5.

This section asks about what work-based learning provision would need to look like for your industry or sector to use it.

4.1 What are the main reasons organisations in your industry or sector do not enter employees into work-based learning?

4.2 What would providers, TEC, or industry need to do differently for organisations in your industry or sector to take up work-based learning?

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4.3 What would a future work-based learning delivery model that works for your industry or sector look like in practice?

This could include things like timing, location, workplace support, online or block learning, type of assessment.

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4.4 Is there anything else you would like to tell us about making work-based learning usable for your industry, or sector?

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Section 5: Skills and training needs

This optional section asks about current skills gaps and future skills or training needs related to your industry or sector.

5.1 What skills gaps or shortages is your industry, or sector facing, if any?

There are currently gaps in how we onboard and train new entrants to the industry. Particularly for forest harvesting, as over 85% of roles now involve operating specialist machinery. In the past when most jobs were manual “on the ground” roles, it was relatively easy to find tasks for a new entrant to assist with. This is not the case now. A Machine

Operator School to help build basic machine operation skills and operator confidence would be useful to help bridge this gap.

Also more emphasis could be given to high performance roles across the industry. Deepening skills and expertise. How to get existing machine operators the next level. How to add unlock higher productivity from equipment, less breakages, and lower running costs from doing what the top 5% of operators do. Building more skill in machine maintenance and trouble shooting. There is a lot more work to be done to improve productivity.

Improving the connection between training and improving safety outcomes.

More professionalism and depth is also needed in forest silviculture training, for example, developing greater expertise in areas such as thinning for value.

Further work is needed to attract more young New Zealanders into forestry silviculture roles and reduce reliance on migrant workers to meet workforce needs.

There is also a potential gap in forest harvesting and silviculture supervisor training. It is important that the sector maintains a pipeline of entry level forest management (harvesting and silviculture supervisors) professionals who have gained practical experience working within harvesting and silviculture crews. These individuals bring valuable operational knowledge and are well positioned to progress into forest management roles.

The Diploma in Forest Management previously delivered by Toi Ohomai helped meet this need, however its cancellation in 2024 has created a potential capability gap for the industry. It is important that the new provider delivering the Level 6 programme, currently the only forest management diploma of its kind in New Zealand, receives appropriate funding support from TEC to ensure its sustainability.

We expect an intake of approximately 10 learners per year providing a steady pipeline of future forest management capability.

5.2 What new or different skills do you expect will be needed in the future, if any?

For forest harvesting most roles will be machine operation based, but manual falling skills will still be required for the 15% of the national estate which cannot be felled by machines, (equating to approximately 4.5 million tonnes, or 2.25 million trees per year)

Machinery will continue to evolve and become more sophisticated. Pattern or workers specialising in operating in one or two machines to a high skill level will continue. Adding more depth to existing training will be important.

5.3 Would you be willing for us to contact you if we have follow-up questions about your response? If so, please provide your contact details.

Please contact me at joseph.brolly@nzfoa.org.nz or 027 472 9376