

State of a Thriving Nation

**Health, Safety and Wellbeing
in New Zealand**



Business Leaders'
Health & Safety Forum

SEPTEMBER 2025

State of a Thriving Nation 2025

This report was produced by economists Shamubeel Eaqub and Rosie Collins for the Business Leaders' Health and Safety Forum.

We would like to acknowledge ACC, WorkSafe NZ and Statistics NZ for providing access to their most recent data for this report.

For further information:

Visit: www.forum.org.nz

Email us: info@forum.org.nz

About the Forum

We are a coalition of 440+ business and government leaders committed to improving the performance of workplace health and safety in New Zealand and working towards our vision of *leaders building cultures that enable people and businesses to thrive*. We connect CEOs and senior leaders to share, learn and advocate for a thriving New Zealand. Through its members, the Forum represents more than 25% of New Zealand's total workforce.

This report is in its third year and is part of the Forum's work to advocate for improved health and safety performance across New Zealand.

Thank you to our member CEOs and organisations for their support, which enables the Forum to produce this report on an annual basis. Special thanks also to CEOs Wendy Rayner, Gavin Hudson and Hugh Goddard for generously sharing their insights as part of this report.



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1. Foreword

That New Zealand's health and safety performance is under achieving and is increasingly costing the country billions of dollars a year is not new.

This is the third *State of a Thriving Nation* report commissioned by the Business Leaders' Health and Safety Forum – reporting annually on the performance of New Zealand's health and safety system.

For the past three years we have published now nationally recognised and referenced figures on the cost of poor performance in this country.

This year we not only update the total cost of poor performance we also link countries' productivity and fatalities – showing a clear and urgent need for improvement.

We demonstrate how businesses are playing their part in contributing to a safer, more profitable New Zealand. Our challenge is for more New Zealand businesses to step up and contribute.

Too many still see health and safety as a zero-sum cost delivering no other benefit or value to the business. We know from Forum members and other leading businesses that an investment in safety is an investment in operational excellence that leads to profitable, and safer performance.

At a time when New Zealand is searching for growth and a thriving economy, leadership of health and safety has never been more important.

Positively, overall workplace injuries are trending down, however the significant increase in time away from work per injury represents an imperative challenge for us turn around. By taking a focused approach on safety as a key outcome of efficient, effective business processes we can unlock more working capacity, engage our workers and suppliers to innovate and reduce the drag on our businesses, health and safety system and our communities.

We want to see leaders:

- doubling down on critical risk controls
- ensuring they remain connected to 'work as done' including with their supply chains
- proactively managing return to work for those workers affected.

We know many CEOs are already doing this, and more, but if we are to do our part to improve our country's international competitiveness and prosperity, we need all our CEOs, Board Chairs and Directors to join the dots on safety and productivity and lead from the top.

We can, and we must do better.



Francois Barton
Chief Executive



Sheridan Broadbent
Chair

2. 2025 in a snapshot



\$5.4b

total cost of harm
in 2024



x6.5

more likely to be
killed at work in
New Zealand
than the UK



41%

of employees have
been in their job
for a year or less



4 lessons for businesses

to secure stronger safety
and operational performance

1

Secure & sustain
funding for safety

2

Track & value
hidden benefits

3

Keep people at the core
of work design and delivery

4

Integrate safety
into daily operations

3. Executive summary

In 2024 the cost of New Zealand's health and safety performance was \$5.4 billion. That's an increase of \$1b in real terms over the past decade alone.

Our fatality rate today is where Australia was 16 years ago, and where the United Kingdom (UK) was 40 years ago. Right now, a New Zealand worker is 6.5 times more likely to be killed at work than a worker in the UK.

Time off work rising sharply

While there has been an encouraging reduction in the number of injuries at work over the last decade, the time off work from each injury has doubled in the past ten years.

The lengthening duration of time out of work is due to a range of factors including, but not limited to:

- more severe injuries
- changes in workers' claiming behaviours or medical treatment provider practices
- ACC operational changes
- constrained health system capacity leading to delays, and
- injured people presenting with multiple comorbidities leading to longer time off.

This is putting an unacceptable cost on our people, businesses and ACC.

The most injury prevalent industries are Forestry, Fishing, Construction, Agriculture, Manufacturing and Logistics – similar to previous years.

Workplace injuries in New Zealand are more prevalent among Pasifika and Māori ethnicities. This report's analysis suggests this is largely due to the occupational mix of work, in that there are more Pasifika and Māori people working in the most injury prevalent occupations, leading to an over-representation in these figures. This reinforces the importance of leaders understanding 'work as done' and doing so in a culturally responsive way.

New Zealand is seeing high levels of new employees in their job – in 2023 41% of New Zealand employees had been in their job for 1 year or less, according to data from Statistics NZ.

This reinforces the need for employers to focus on ensuring:

- meaningful competence and capability of new employees
- appropriate training and work demands
- and appropriate levels of capable supervision.

Productivity and safety

For the first time we're able to show that there is a link between lower workplace deaths and higher productivity in many countries.

Our productivity has slipped behind Australia for nearly 40 years, as has our workplace fatality rate. As we set out in this report it is compelling that of the 25 OECD countries with better productivity than New Zealand, 80% of them kill fewer workers per 100,000 employed.

We know that improved safety and operational performance can both be achieved in tandem, if done right.

Business can lead the way

Given New Zealand's disappointing progress on regulatory stewardship highlighted in the 2024 *State of a Thriving Nation* report, and the recent health and safety reforms announced by the coalition government failing to address the systemic issues in health and safety in New Zealand, this 2025 report focuses on what business can do to lead the way in improvement.

We know that since 2015 around half of all New Zealand business innovation practices have been motivated by health and safety. Within the Forum there are clear examples of where investment can lead to both improved safety and operational performance.

Informed by international research and Forum member experiences, this report sets out four lessons for business to secure stronger safety and operational performance:

Secure and sustain funding for safety

By identifying all safety critical risks, having a budget line for safety improvements, and leveraging collaboration to pool safety resources and expertise.

Track and value hidden benefits

In addition to monitoring regular operational performance, measuring less obvious metrics such as staff turnover, retention, and training costs and linking them to safety performance. Accounting for reputational risk when assessing return on safety investments and promoting safety as a brand advantage to clients and partners.

Keep people at the core of work design and delivery

Designing processes and environments to make unsafe shortcuts harder, engineering-out risk through technology and automation without undermining the role of judgement from the team. Training workers and managers to recognise hazards in real-world conditions.

Integrate safety into daily operations

Aligning procurement practices with safety objectives, financially supporting safe operations by recognising and rewarding safety investment of third parties. Holding middle managers accountable for safety outcomes, supported by leadership. Actively closing the gap between work as imagined and work as done.

Hope for the future

With business leading the charge we have the potential to change the poor trajectory New Zealand is on and reverse some of the preventable costs to our people, our businesses and our economy.

4. Recorded harm and its costs

The cost of harm has increased by nearly \$1b alone in real terms in the past decade.

In 2024 the cost of harm from all workplace injuries, fatalities and long-term illness was \$5.4b, up from \$5.2b the year prior (excluding inflation). This is made up of:

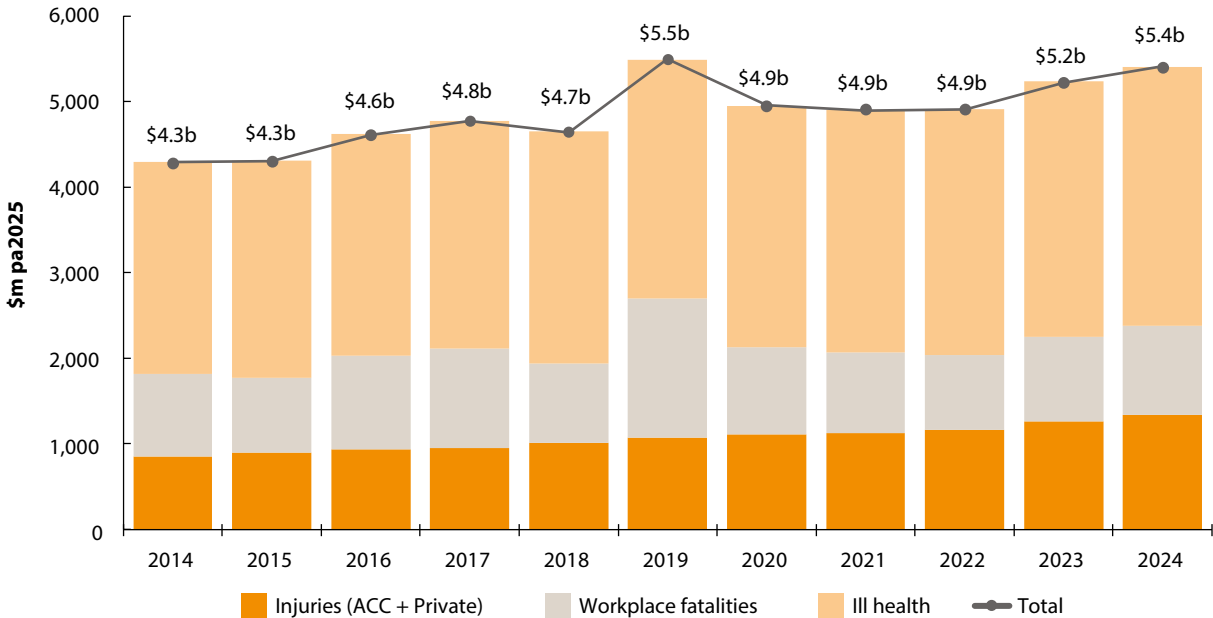
- fatalities (at the Statistical Value of Life¹ equating to \$1,035m)
- serious claims (ACC costs and lost income to individuals equating to \$1,340m)
- illnesses (WorkSafe NZ estimated the burden of harm from disease and long-term injuries at

least \$2b for 2017², which we updated with more recent health statistics and for inflation, equating to \$3,033m).

Injuries and fatalities are relatively easily measured, but illness related to workplace harm is more challenging as there can be long delays and causality is not always easily established.

Figure 1: The harm of workplace injuries, illness and fatalities was \$5.4b in 2024, and has trended higher over the last decade

Cost of harm (excluding inflation)



Source: Author estimates from WorkSafe NZ, ACC and Statistics NZ data

1 Statistical Value of Life represents the amount individuals are collectively willing to pay for a reduction in the risk of death, often used to assess the benefits of safety improvements in areas like transportation, and is used in the Treasury's Cost Benefit Analysis tool, the CBAX available at: www.treasury.govt.nz/information-and-services/public-sector-leadership/investment-management/investment-planning/treasury-cbax-tool

2 www.worksafe.govt.nz/topic-and-industry/work-related-health/work-related-health-estimates-and-burden-of-harm/

We have estimated a longer history of workplace harm for the last decade (Figure 1), shown with the effect of inflation removed.

We have slightly revised up the previous two years' estimates of the total cost of workplace harm, in particular the cost from illness (by \$190m for 2023, and by \$117m for 2024), because of more up to date hospitalisation³ and mortality data⁴ from the Ministry of Health. Because of lags in publication of health data, the health-related cost estimates for the last two years are provisional estimates based on partial data. We estimate that in this period over 6,000 people suffered or continue to suffer from long-term health issues and over 800 people died prematurely.

While these statistics are sobering, our estimates of harm are conservative

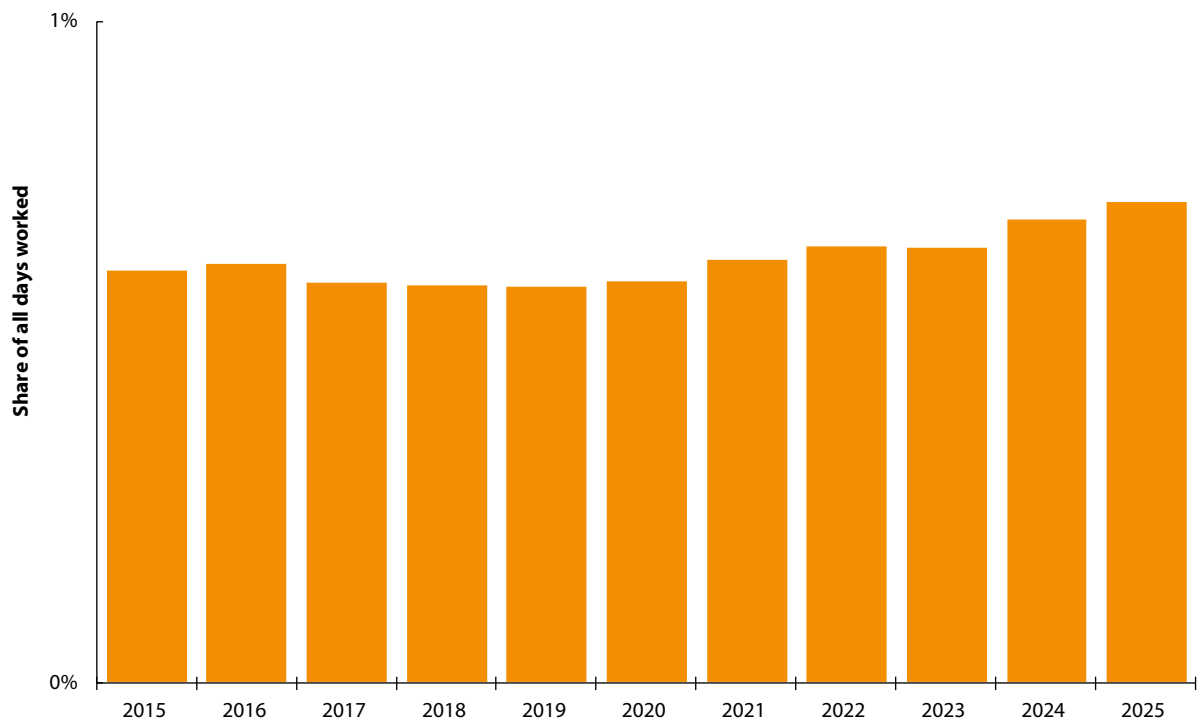
Our latest estimate of harm is 1.3% of GDP.

Earlier international estimates⁵ have found a much higher burden at closer to 3.6% of GDP.

For context, a purely 'transactional' economic cost could be considered as the time lost from the economy due to injured days off, which was 0.75% of all working days (Figure 2). This excludes days off for sickness or mental health reasons. This is half of what our median annual jobs growth (1.6%) has been over the last 20 years. Worryingly, this has trended higher since 2015, meaning there is now a greater amount of workforce potential lost to injured time off work than there was nine years ago.

Figure 2: 0.75% of our workforce capacity was lost to injuries

Share of workdays lost to injury



Source: ACC, Statistics NZ data

3 www.tewhaturora.govt.nz/for-health-professionals/data-and-statistics/hospital-event/web-tool

4 www.health.govt.nz/statistics-research/statistics-and-data-sets/mortality

5 Takala, J., Härmäläinen, P., Sauni, R., Nygård, C.-H., Gagliardi, D., & Neupane, S. (2023). Global-, regional- and country-level estimates of the work-related burden of diseases and accidents in 2019. *Scandinavian Journal of Work, Environment & Health*, 50(2), 73–82. <https://doi.org/10.5271/sjweh.4132>

4.1 Fatalities stubbornly high

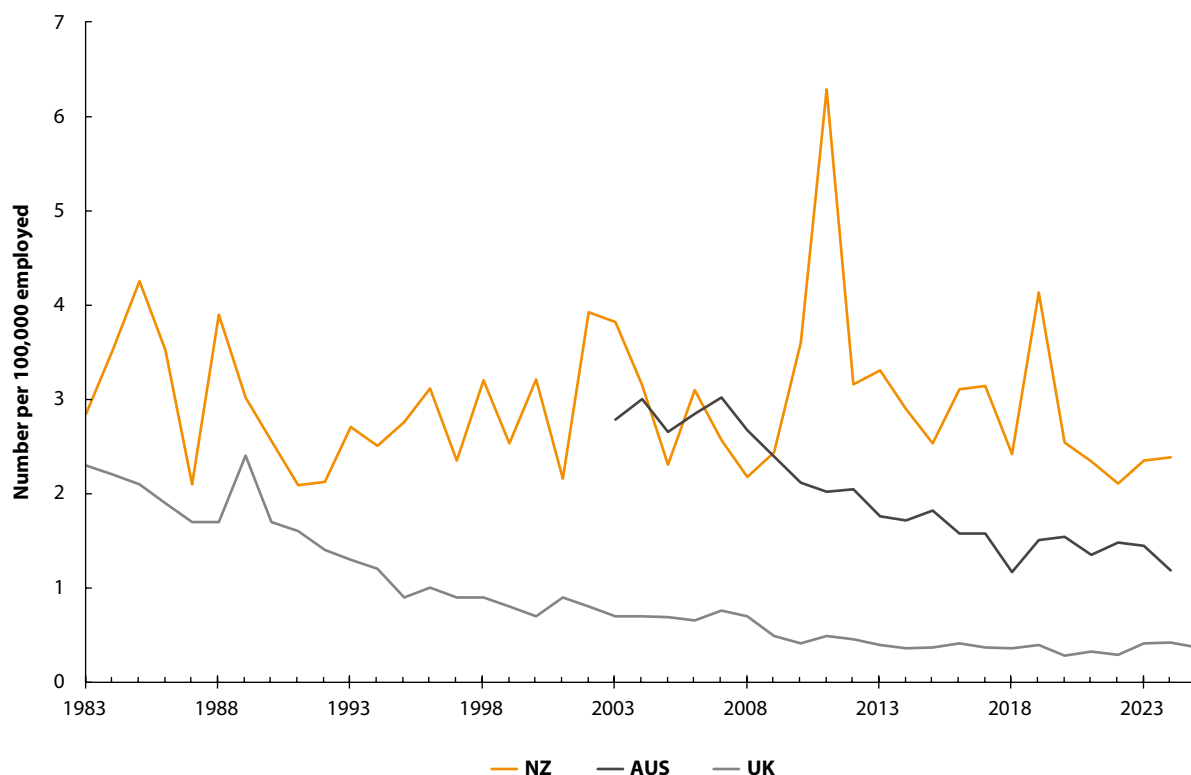
New Zealand's workplace fatality rate had been reducing in recent years, but ticked up in the last two years. In this section, as in previous years we have compared statistics with Australia and the UK, because we share similar legislation, although our regulatory

practice and arrangements like insurance and industrial structure differ.

There are also differences in reporting fatalities between jurisdictions, in the UK they exclude transport and self-employed work-related deaths.

Figure 3: New Zealand's workplace fatality rate is not improving enough

Workplace fatality rate: NZ, UK & Australia



Source: ACC, Statistics NZ data

Our fatality rate today is where Australia was 16 years ago, and where the UK was 40 years ago (Figure 3). Our workplace fatality rate (averaged over the last 5 years) is 1.7x higher than Australia, and 6.5x higher than the UK (Figure 4).

Improvements in Australia and the UK over time makes the hopeful case that we can also improve, with the right regulatory practice ([as noted in our 2024 report](#)) and action within business (which we focus on later in this report).

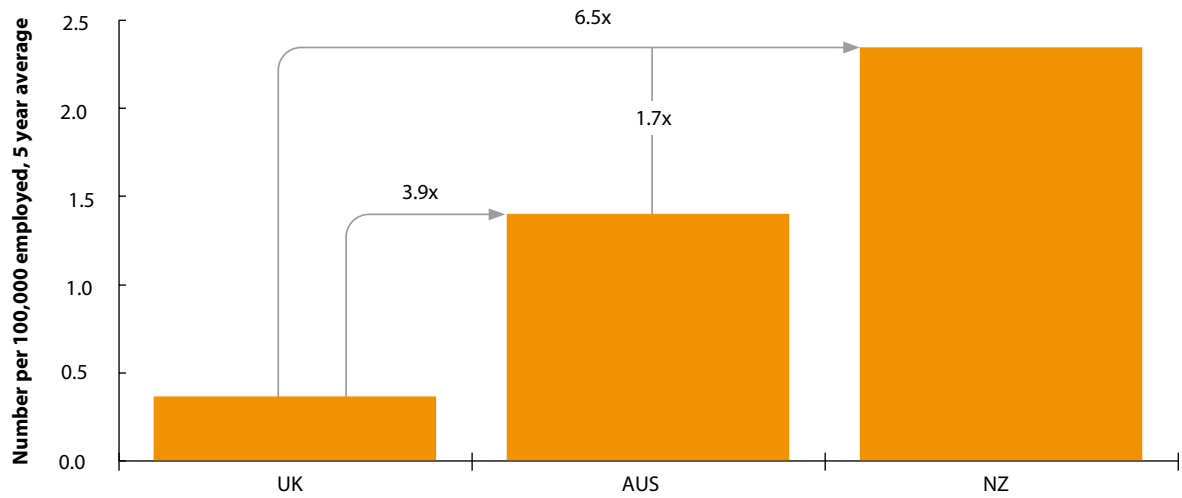
There is a temptation to explain New Zealand's higher fatality rate due to our industrial composition, especially because of our higher exposure to agriculture.

However, New Zealand's workplace fatality rate by industry is higher across most industries. It is not that we have a differently structured economy, rather we have systemic issues that lead to higher fatality rates across most sectors of the economy, such as the inability to take civil cases for injury, lower rates of unionisation and the dampening of direct cost signals to businesses of injury due to ACC socialising the costs.

For example, in the five years to 2023, the number of construction fatalities per 100,000 workers in Australia was 2.4, but 1.5x higher in New Zealand at 3.7 per 100,000 workers. If we caught up with Australia in the construction sector, over a five-year period 11 more people would still be alive today.

Figure 4: NZ's fatality rate is 1.7 times that of Australia and 6.5 times that of the UK

Fatality rate

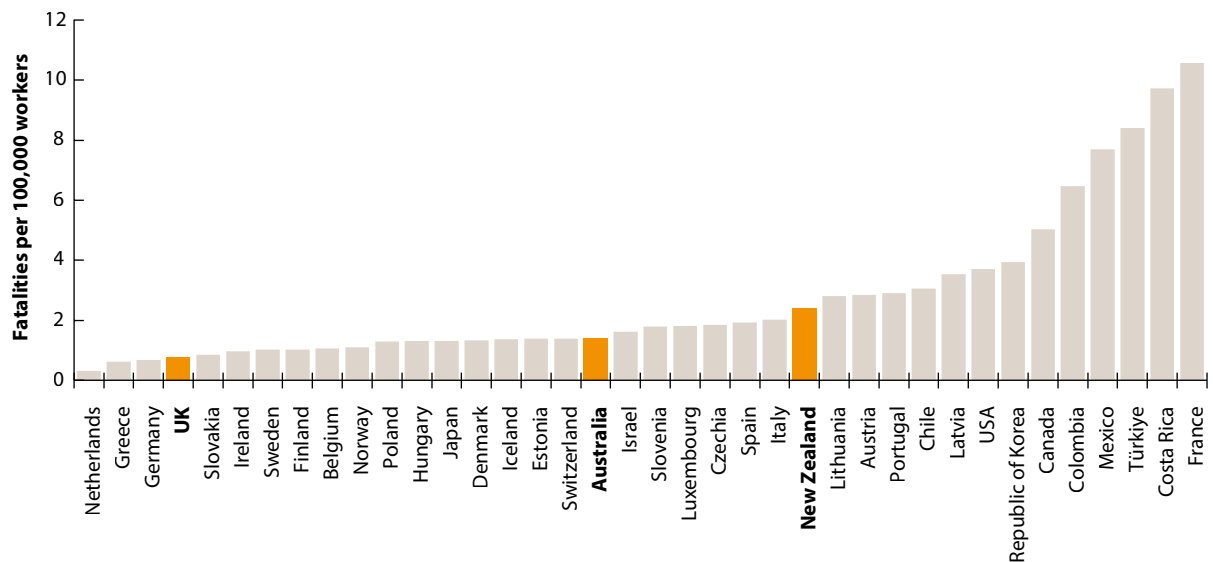


Source: WorkSafe NZ, Safe Work Australia, HSE, ABS, ONS, Statistics NZ

While New Zealand's workplace fatality rate is high compared to the UK and Australia, we aren't the worst performer across the OECD (Figure 5).

Figure 5: New Zealand's workplace fatality rate is higher than that of two-thirds of OECD countries

OECD workplace fatalities



Source: International Labour Organisation (ILO), WorkSafe NZ, SafeWork Australia

4.2 Productivity and safety performance

Our productivity has lagged behind Australia for nearly 40 years.

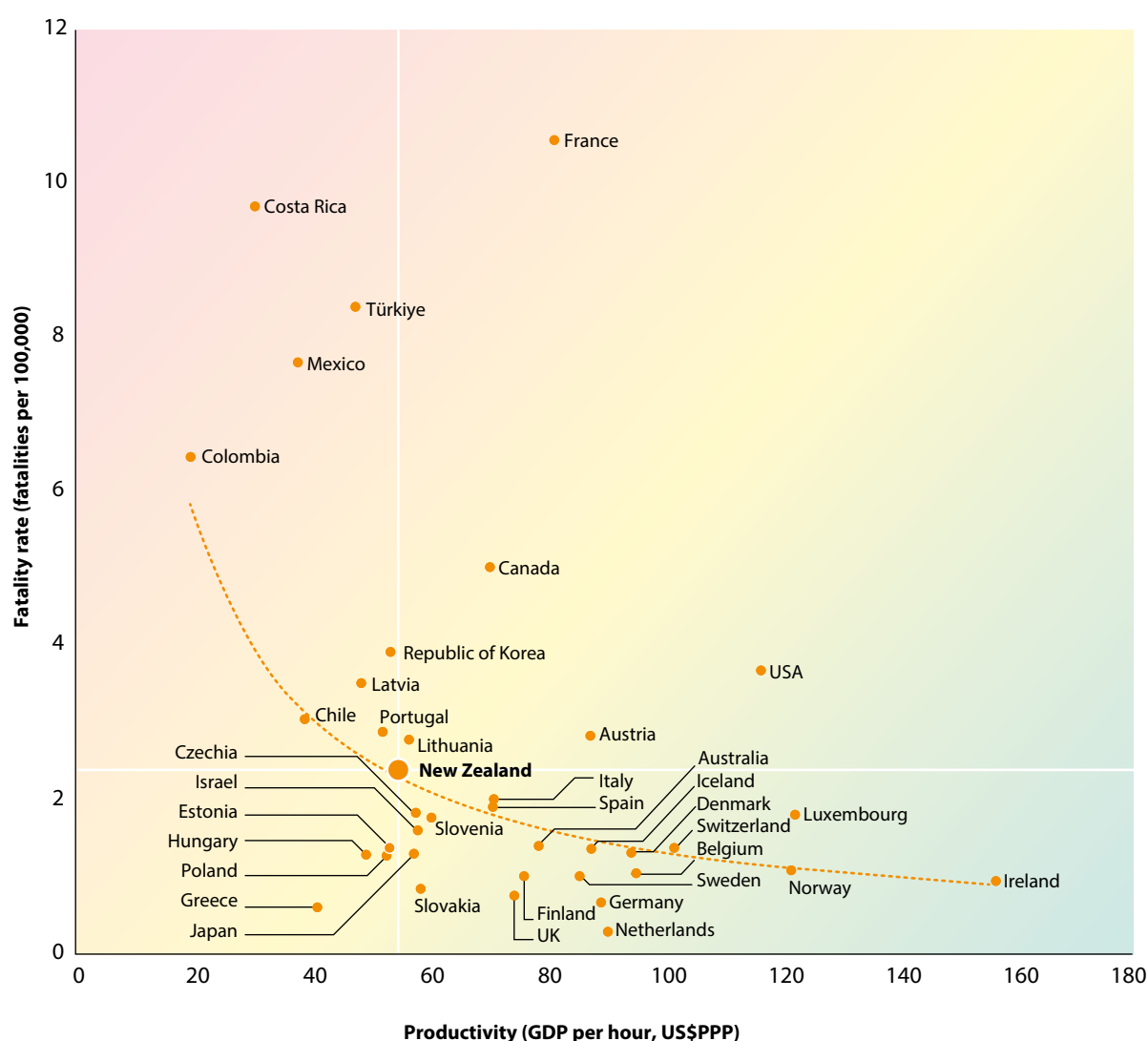
OECD comparison of productivity and workplace fatalities shows that there is some correlation between fatality rates and productivity (Figure 6). This correlation needs to be treated with some caution, because the

data on fatalities is not reported consistently, and the relationship is not necessarily causal.

Nevertheless, it is compelling that of the 25 OECD countries with better productivity than New Zealand, 20 of them kill fewer workers per 100,000 employed.

Figure 6: There is some correlation between productivity and safety, but success requires good regulatory and business practices

Fatalities vs productivity



Source: ILO, OECD

4.3 Injury claims drop but time off work doubles in a decade

Injuries that lead to over one week off from work provides us a measure of serious injuries, which lead to substantial personal, business and ACC costs.

There has been an encouraging reduction in the volume of injury claims over the last decade. This improvement in safety performance through reduction in injuries is positive. However it flatters to deceive when these injuries are leading to more time off work (an average of 15 days per claim), **twice as much as a decade ago** (Figure 7). If we want to see an economic benefit in this reduction in injuries, we need to reduce the time away from work per claim.

This lengthening duration of time out of work is due to a combination of factors according to qualitative industry feedback: more severe injuries, constrained health system capacity leading to delays, and injured people presenting with multiple comorbidities leading to longer time off.

We asked ACC for their views on this growing cost, their response was:

“The increasing trend in work-related WAFW (Week Away From Work) claim rates is also seen in non-work-related WAFW claims in other ACC levied Accounts. This suggests the pattern is likely driven by broader systemic factors rather than a deterioration in workplace conditions.

Investigations by ACC suggest that the growth in WAFW claim rates might be the result of factors not captured by data. These factors could include changes in workers’ claiming behaviours or medical treatment provider practices, or ACC operational changes.

We recently released [... a recent report... which] shows that in the past 20 years since 2004, the costs of supporting New Zealanders with injury have climbed from just under \$1 billion to nearly \$4.4 billion in 2024.

ACC’s sustained focus on improving rehabilitation performance over the last 18 months is having an impact. The Long-Term Claims Pool growth rate (people on the Scheme for longer than a year) is now decreasing for the first time in a decade.

We are focused on delivering the help and support to New Zealanders who need it most and preventing injury.”

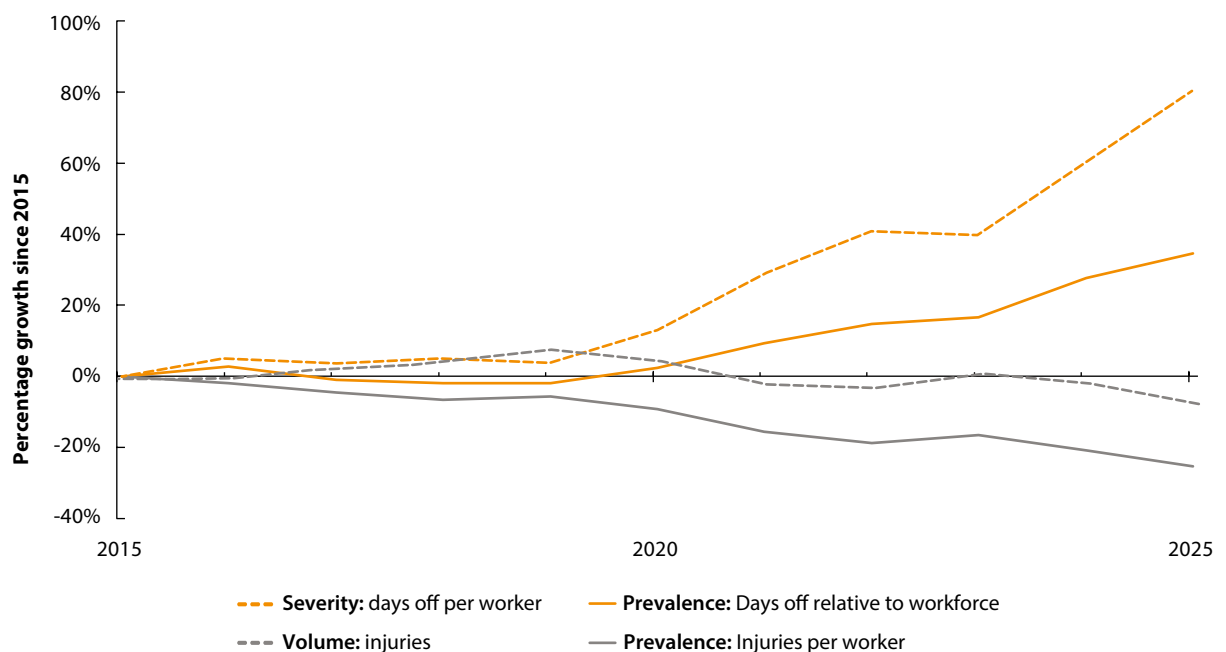
Whatever the reasons, the outcome is the same.

Injuries are cumulatively leading to more time off work.

Reducing injuries represents an opportunity to improve both safety and operational outcomes, however we are currently still failing to realise that benefit.

Figure 7: Reducing injury numbers, but more time away from work

Injury rate & severity



Source: ACC

4.4 We're churning and burning employees

In 2023, 41% of New Zealand employees had been in their job for 1 year or less, according to data from Statistics NZ.

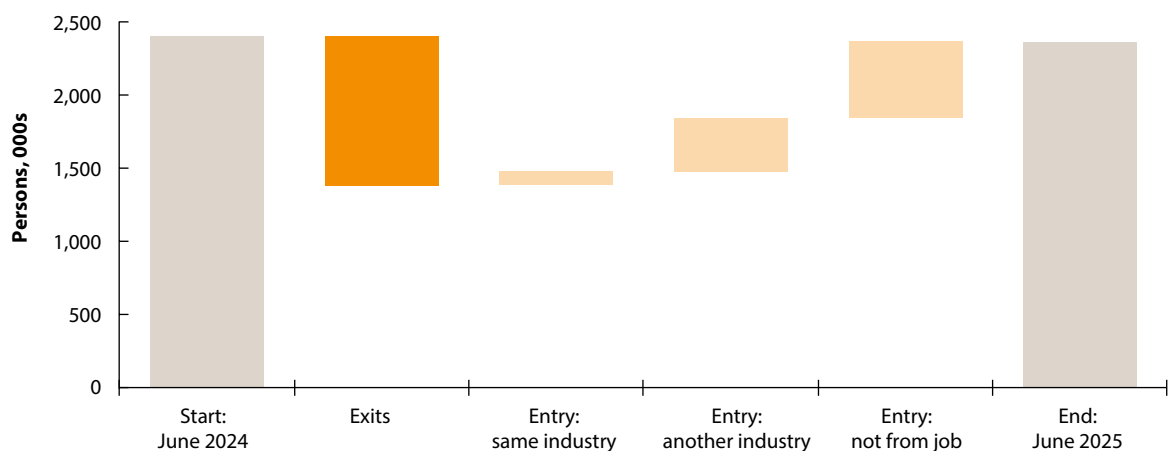
In the last year roughly 1 million people started in a new job in New Zealand, and only 10% of them came from the same industry (Figure 8).

These statistics point to the importance of employers ensuring:

- meaningful competence and capability of new employees
- appropriate training and work demands
- appropriate levels of capable supervision.

Figure 8: Employee exits and entries in the June–2025 year

Employee exits and entries in the June–2025 year



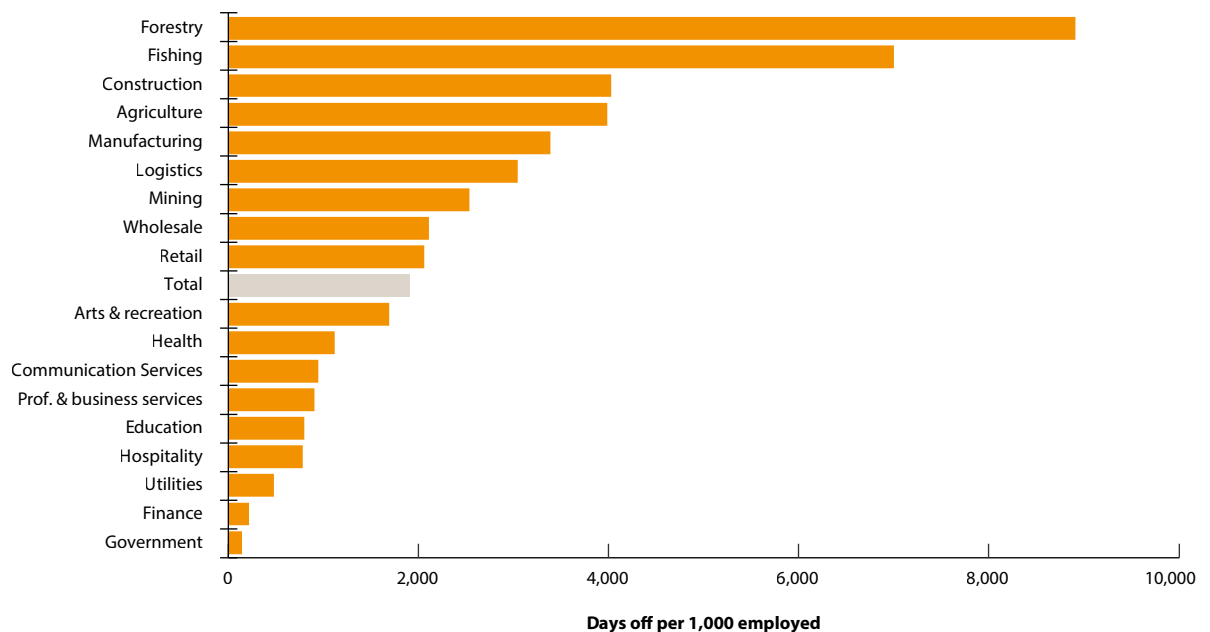
Source: Statistics NZ

4.5 Some industries are inherently riskier

The most injury prevalent industries are Forestry, Fishing, Construction, Agriculture, Manufacturing and Logistics (Figure 9).

Injuries represent significant personal cost to the injured parties and economic or business cost. For example, the construction sector lost over 1 million days to injury claims last year. While the number of new injuries in the construction sector has fallen by 12% over last year, the number of days off work increased by 5%.

Higher levels of risk and injury in some industries reinforces the need to clearly understand critical risks, mitigate where possible with engineered or process controls, and manage remaining risks more effectively. This requires consistent focus on *work as done* vs *work as imagined*, and listening to those close to the coal-face to continuously find improvements.

Figure 9: Some industries are more injury prevalent, requiring heightened attention**2024 Injury rate (days off)**

Source: ACC, Statistics NZ

4.6 Some regions are riskier than others

While the total number of injury claims has been trending lower across New Zealand, there are large divergences between regions.

While Wellington is the safest region, Southland is the most injury prevalent (Figure 11). The regional differences in injuries are caused by industrial makeup and systemic safety performance.

For example, Wellington enjoys lower injury rates because it has fewer jobs in higher-risk industries, and also because safety performance is better within this region. In contrast, Southland has riskier industries,

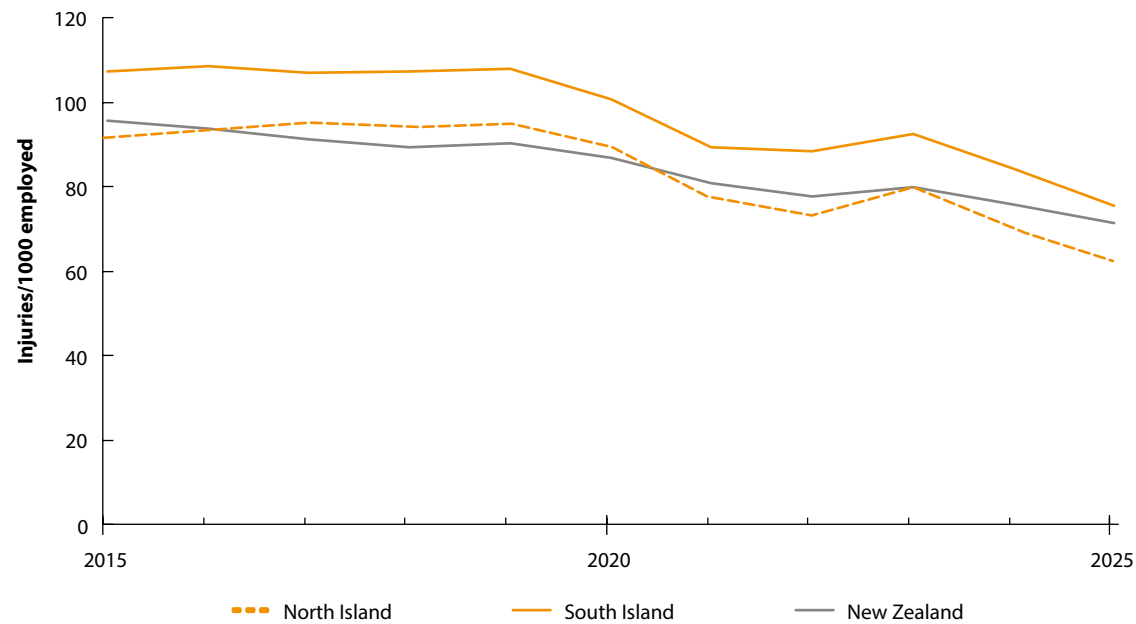
and a higher injury rate in those industries compared to the national average (Figure 12). There are sometimes easy explanations: an agriculture industry job in Wellington is a desk-based one, but it's more likely to be on a farm in Southland. However, it would be a mistake to think the regional differences are solely explained by these occupation differences.

In Southland, the injury rate in almost every industry is worse than the national average.

This shows the importance of local approaches to improving safety practices.

Figure 10 While injuries are improving, there are persistent differences across regions

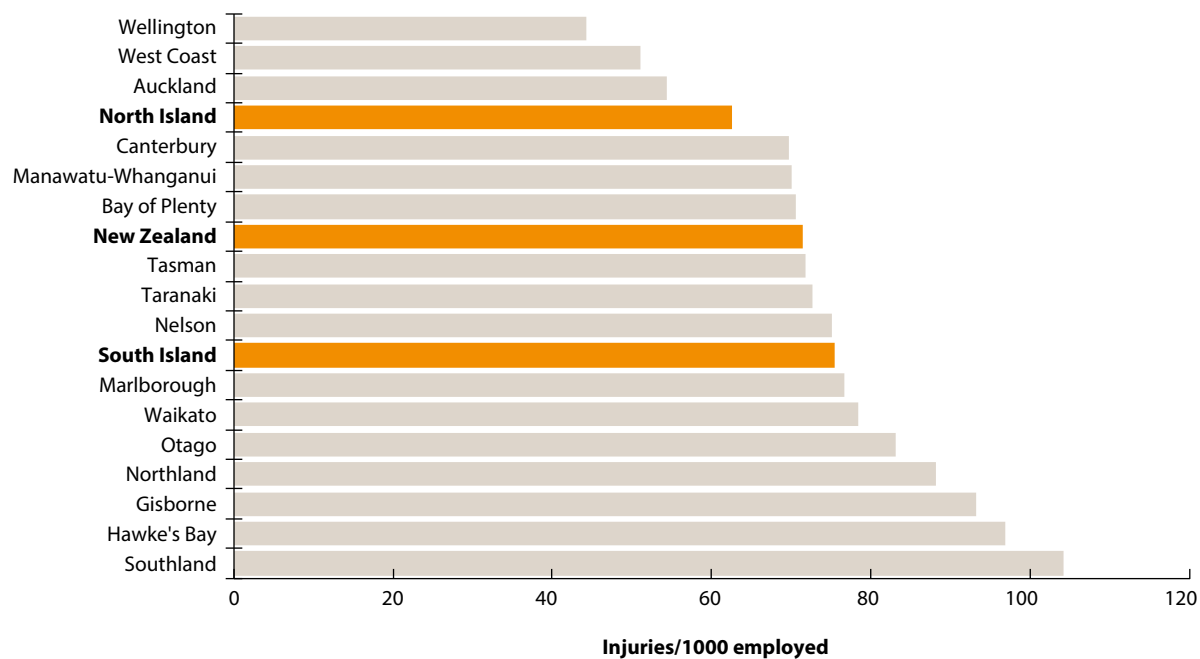
Injury rate by Island



Source: ACC, Statistics NZ

Figure 11: There are regional differences in injury rates

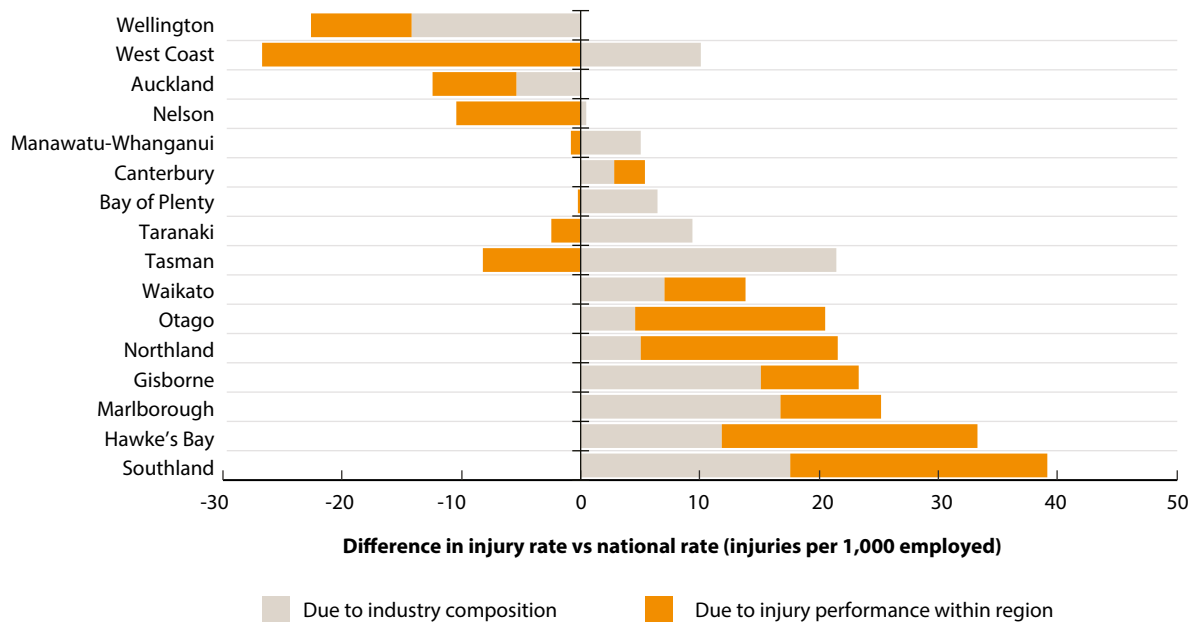
Injury rate by region (2025)



Source: ACC, Statistics NZ

Figure 12: Regional differences are sometimes due to industrial makeup of the local economy; different performance within industries suggests local systemic issues too

Drivers of regional injury prevalence differences



Source: ACC, Statistics NZ

4.7 Differences across age and ethnicity

Injuries tend to be more prevalent among younger (20-29) and older people (60+), and among Pasifika and Māori ethnicities (Figures 13, 14). There are different reasons for this.

The analysis of this for recent years is made difficult because of a paucity of detailed occupation data. Our high-level analysis suggests that younger people are often over-represented because of the types of occupations they work in (more likely to be in more physical and site-based work) and older people tend to get hurt more often and more severely.⁶

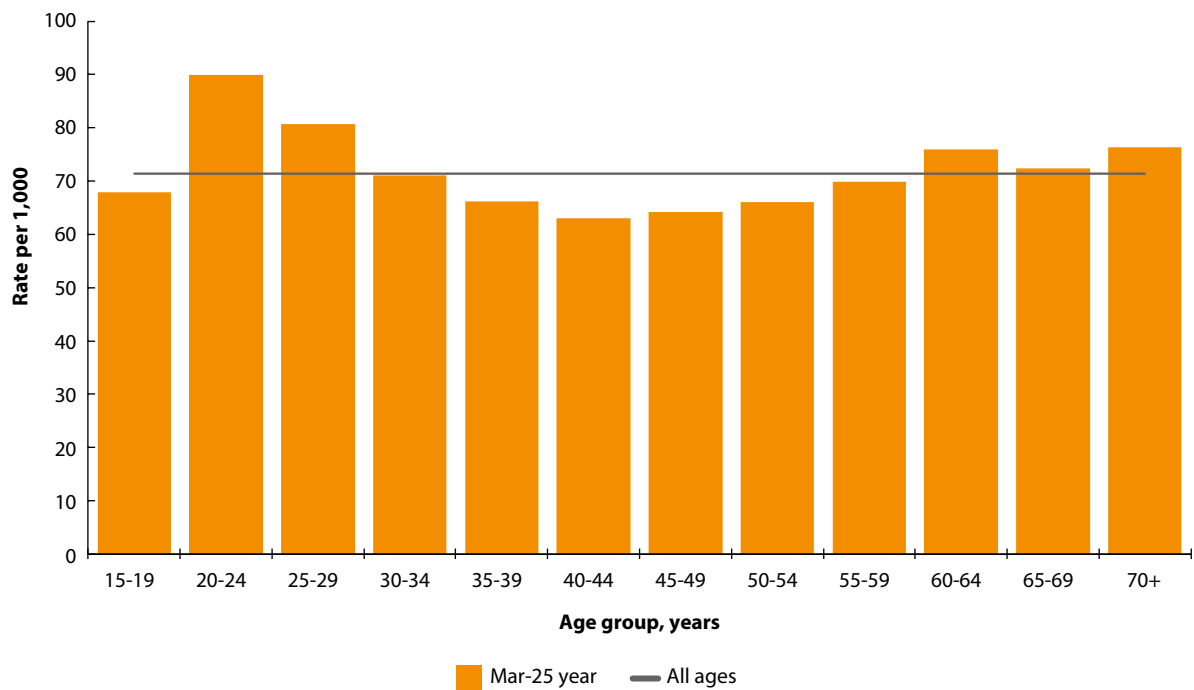
When we look at ethnicity differences in injuries, much of it is explained by the occupational mix of work and was set out in our previous two reports. One caveat, the occupation classification by ACC does not neatly match to the Census data, making the analysis challenging. Nevertheless, Pasifika and Māori are over-represented in more injury prevalent occupations and industries – consistent findings in the 2018 and 2023 censuses.

This suggests that we need to focus on improving work design and routines to improve safety performance of high risk occupations, and cultural competency is a useful ingredient in ensuring that those improvements are adopted and retained in the workforce.

⁶ https://nzpri.aut.ac.nz/_data/assets/pdf_file/0007/787750/Workplace-safety-and-the-future-of-work-in-New-Zealand.pdf

Figure 13: Younger and older people get hurt more

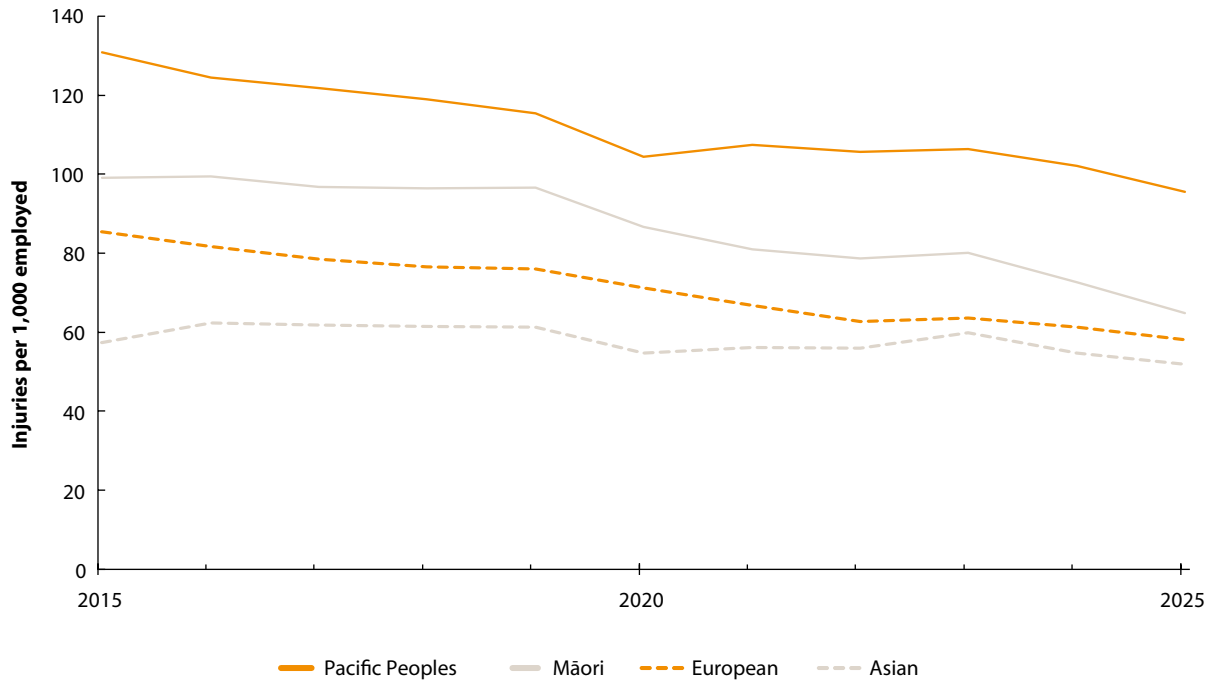
Injury rate by age



Source: ACC, Statistics NZ

Figure 14: Pasifika and Māori experience higher injury rates, but this appears largely linked to occupation mix

Injury rate by ethnicity



Source: ACC, Statistics NZ

5. Regulatory snapshot

In the *State of a Thriving Nation 2024* report, we took a closer look at the health and safety regulatory system and where New Zealand sits in comparison to the UK and Australia.

The 2024 report highlighted that New Zealand's regulatory interventions are more reactive than in Australia and that our regulatory system lacks a mechanism for oversight and coordination, which is at the heart of the successful regulatory approach by the UK's Health and Safety Executive.

Six months later in early 2025, the New Zealand Government announced health and safety reforms including rebalancing WorkSafe NZ's focus from enforcement toward earlier engagement and more guidance. However, this does not follow the usual regulatory intervention model, not in its intent nor practice, as evidenced in the UK or Australia.

Since that announcement recent changes have included a joint education initiative with NZTA, the removal of outdated guidance, a new four-part appropriation structure aimed at improving fiscal transparency, and the introduction of a hotline to address perceived over-compliance in temporary traffic management. These measures were introduced by the Minister for Workplace Relations and Safety as part of her health and

safety reforms, in part, in response to WorkSafe NZ's operational culture, particularly concerns about inconsistency, vague guidance, and regulatory overreach.

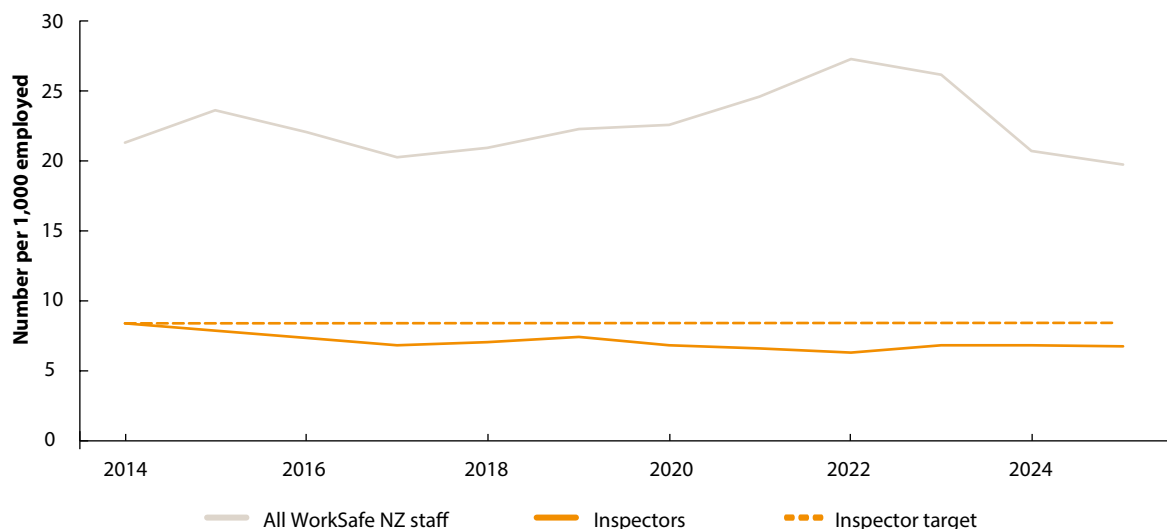
Legislative reforms are yet to be passed into law, but do look to respond to the concern about business confusion of standards and a clear signal about focusing on more serious risks of harm. However, the reforms, as currently framed in August 2025, have not responded to the lack of systemic alignment across government agencies with responsibility to improve health and safety in New Zealand.

The persistent challenge of insufficient inspector numbers has been recognised by WorkSafe NZ and we understand this is part of their organisational reset (Figure 15).

Number of inspectors, in and of itself, is not necessarily the issue. As the comparison with OECD countries shows (Figure 17), there is a wider variety of inspector ratios: relatively low in the UK for example, but very high in Germany. But there has to be a credible and effective overall approach to regulatory practice.

Figure 15: WorkSafe NZ continues to lag its stated inspector resourcing goal

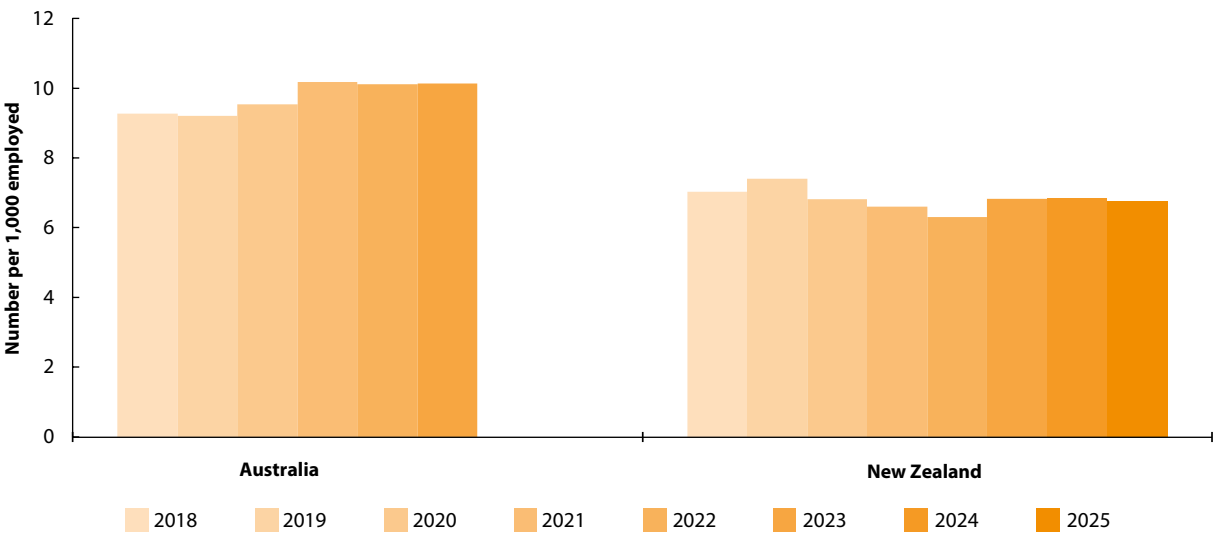
WorkSafe NZ staffing: inspectors and total



Source: WorkSafe NZ, Statistics NZ

Figure 16: Number of inspectors is lower in NZ, although its partly related to how we measure inspector numbers

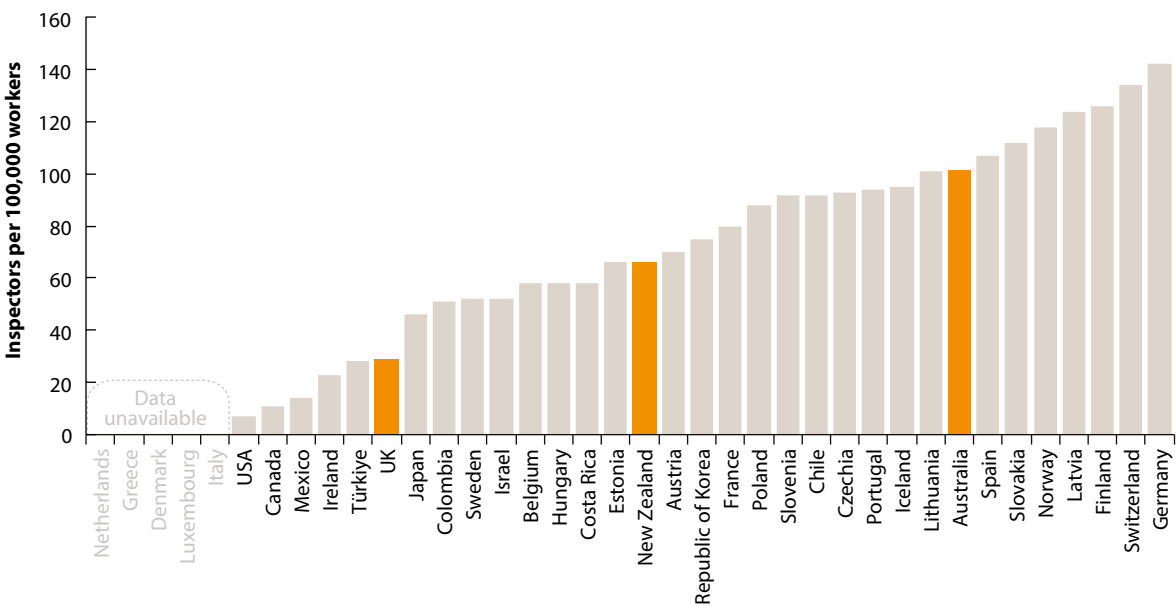
Number of inspectors



Source: WorkSafe NZ, Statistics NZ, SafeWork Australia, ABS

Figure 17: The UK has far fewer inspectors compared to both NZ and Australia

OECD Inspector Density



Source: ILO, SafeWork Australia, WorkSafe NZ

WorkSafe NZ told us:

“WorkSafe NZ is taking a more proactive and practical role in guiding duty holders. This includes providing clearer, sector-specific advice, updating outdated resources, and promoting Approved Codes of Practice (ACOPs), whether developed by WorkSafe NZ or industry.

WorkSafe NZ is prioritising high-risk sectors, restructuring its funding model for transparency, and is ensuring our guidance is consistent and clear to provide greater certainty about what is reasonably practicable under the law.”

6. Improving operational and safety performance in businesses

Given New Zealand's context of:

- increasing time off work due to injuries
- increasing burden of harm, and
- no programme of meaningful regulatory coordination across government,

our 2025 report shifts focus to the productivity and innovation benefits of fostering effective safety practice. This is about encouraging the agency that

businesses have to improve both safety and operational performance on their own terms, and by doing so it can deliver win-win outcomes of less harm, more innovation and better productivity.

This deep dive is based on literature that is grounded in safety and business practice and cross checked with qualitative interviews of selected Forum members.

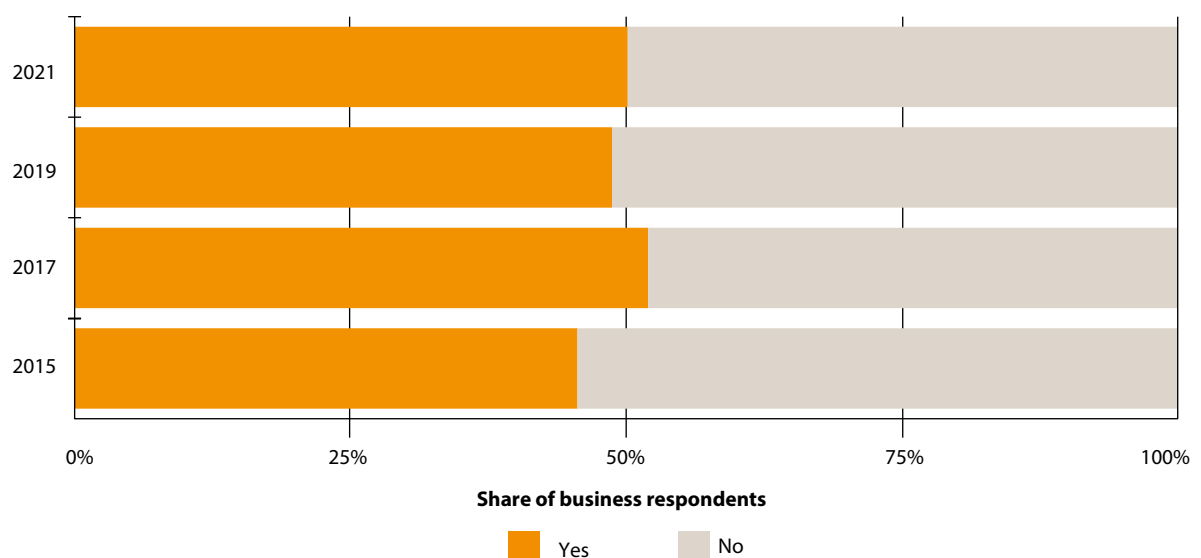
6.1 How businesses think about innovation and safety

While 'safety first' is an excellent sentiment, no business exists solely to 'do safety.' Safety is an outcome, never the primary task of an organisation. Safety is about how work is done.

That safety and operational performance can go hand-in-hand should not be a surprise. Surveys of New Zealand businesses since 2015 have found around **half of all business innovation practices are motivated by health and safety** (Figure 18).

Figure 18: Nearly half of all innovation is motivated by safety improvements; safety and innovation are not zero sum

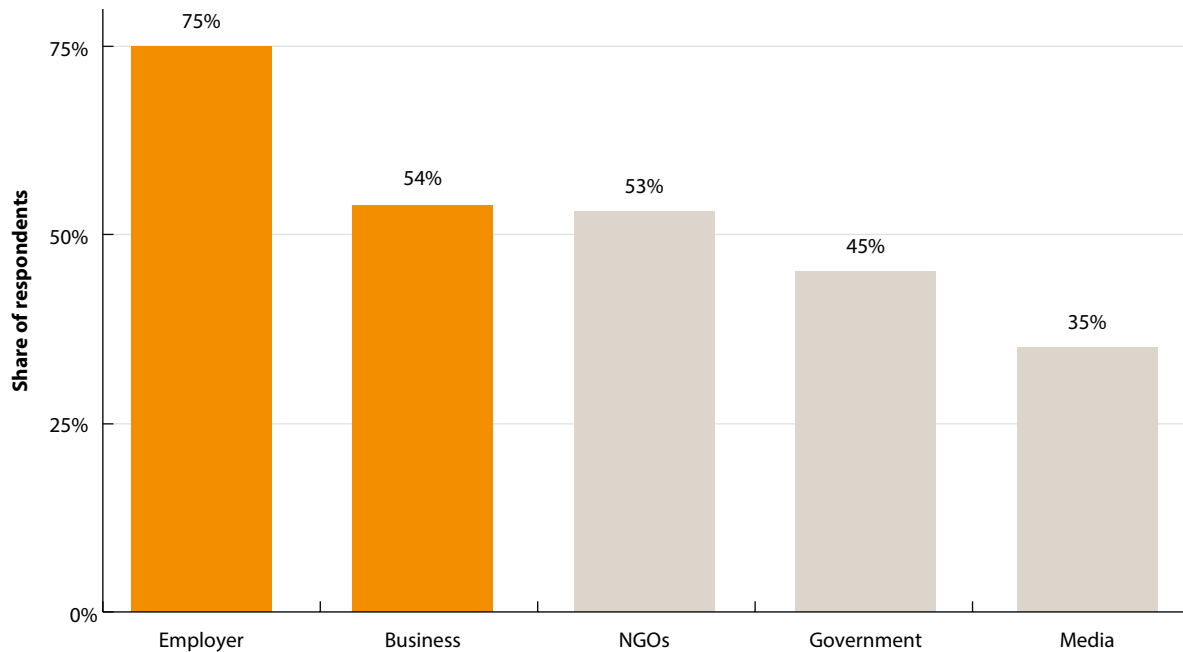
Reasons for innovation – to improve work safety standards?



Source: Statistics NZ

Figure 19: Trust in employers outweighs other institutions

Trust in institutions



Source: Acumen Edelman Trust Barometer 2025

At a time when trust in traditional institutions such as media and government is diminishing, more New Zealanders are trusting their employer than any other organisations (Figure 19).

So with people placing higher trust in employers, and 50% of businesses innovating for health and safety – how can we make it even more pervasive across New Zealand?

We know there remain several misconceptions across many in the business community in New Zealand when it comes to health and safety, in particular:

1. The costs of safety improvements are often clear and present, i.e. staff training, new controls on critical risks; but the financial and other benefits are often not measured and are less certain, spread over time and may be shared with other stakeholders. Unless the business leader adopts a mature mindset, or they have experienced a worker fatality or serious injury, they often underestimate the expense of poor safety performance.

2. Many people incorrectly believe that safety and operational performance are zero sum, i.e., I can be safe or productive, but not both. Such a compliance lens misses the reality of improving 'work as done' in a way that is safe and also delivers business improvements (for example process efficiency, or less easy to attribute future reductions in labour turnover).

Improvement in operational performance and safety can go hand-in-hand. These are not zero-sum outcomes, in fact they are mutually inclusive outcomes.

When businesses look to innovate, whether for safety or improved productivity, operational and safety improvements are mutually achievable.

6.2 Forum leaders on performance and safety

As part of developing this year's report, we spoke with three business leaders: **Wendy Rayner**, Managing Director of Coca-Cola Europacific Partners New Zealand; **Hugh Goddard**, Managing Director of Pipeline & Civil; and **Gavin Hudson**, CEO of C3 Limited. They represent a wide variety of industries and experiences: distribution, sales, construction, and ports. We asked for their reflections on the alignment between performance and safety, where trade-offs

most clearly exist, how their businesses challenge these assumptions in everyday routines, and their views on the hidden, or open benefits of safety investments.

We also shared the table adapted from Shevchenko et al's Canadian study, included in Appendix 1, and sought their views on each section.

All three leaders have a solid record in leading organisations with strong safety and productivity performances.

6.2.1 What they told us

- A **strong focus on the long-term was evident** in all their responses. Some leaders were motivated foremostly by a firm belief in safety as a foundation, with clear links to long-term efficiency and performance. Others focused on production outcomes that also led to safer practices, especially in areas like stock movement and supply chain automation. Across all, there was a strong emphasis on structured change supported by clear processes, senior leadership accountability, and a long-term cultural focus.

"We've grown our market share without competing on price. Some customers value the productivity gains, others the safety improvements, but both come from the same investment."

- **Outcomes were varied but had a positive impact on the business.** Some reported significant gains in staff retention, throughput efficiency, and reputation for quality and reliability. Others noted manufacturing improvements but had less clarity on impacts to people. In one case, staff turnover had not yet been benchmarked against the industry despite being much lower than usual. Two-way communication remains an opportunity, along with a needed shift toward safety performance benefits for staff and managers that are reflected in pay at risk and other incentives.

"Worker turnover has dropped from more than 30% to closer to 10%. That's the payoff from putting people in safer, higher-paid, more respected roles."

"For a 100-person business, the benefit of reducing turnover by 20% is around \$500k a year."

- For leaders, the nature of this risk (i.e. often as a series of judgement calls) highlighted **the importance of clear priorities and solid planning**. For some, this meant improving project planning, while for others it involved targeted technology investments to reduce risk and error. In turn, we heard a desire both to be recognised as reliable partners in others' procurement processes and to better value similar investments made by others within their own organisations.

"An employee trained to our highest competency level is about 54% more profitable for the business than a new hire doing the same role."

Drawing on literature and local expert insight above, the core of these New Zealand experiences and international research is clear, investing in safety creates spillover benefits beyond compliance, significantly enhancing overall performance.



6.3 Key takeouts: Practical lessons for stronger safety and operational performance

► Lesson 1: Secure and sustain funding for safety

- Have we identified all safety critical risks, including less visible harms such as fatigue, stress, and cumulative injury?
- Do we have a budget line for safety improvements, and can we share costs with clients or partners, or support our partners' investments through our procurement approach?
- Are we leveraging collaboration within our sector to pool safety resources and expertise?

► Lesson 2: Track and value hidden benefits

- In addition to monitoring regular operational performance, are we measuring less obvious metrics such as staff turnover, retention, and training costs, and linking them to safety performance?
- Do we account for reputational risk and downtime when assessing safety ROI?
- Are we promoting safety as a brand advantage to clients, recruits, and partners?

► Lesson 3: Keep people at the core of work design and delivery

- Are our work environments and processes designed to make unsafe shortcuts harder?
- Do we use technology and automation to reduce or engineer-out risk without undermining the role of judgement and trust in our team?
- Are workers and managers trained to recognise hazards under real-world conditions, not just ideal ones?

► Lesson 4: Integrate safety into daily operations

- Do our routines, systems, and incentives embed safety into 'how we work,' not just 'what we say'?
- Are our procurement practices aligned with our safety objectives, and are we financially supporting safe operations by recognising and rewarding the safety investments of third parties?
- Are middle managers held accountable for safety outcomes through pay-at-risk incentives, and supported by leadership to prioritise safety consistently alongside production?
- Have we reviewed our daily routines against the effective practice principles in Appendix 1 to check where safety and operations can be more closely aligned?
- Do we actively close the gap between 'work as imagined' and 'work as done' through two-way communication and implementing changes?

► Lesson 1

Market structure shapes safety investment, but collaboration can overcome limits.

Unsafe work often reflects deeper structural and economic dynamics that shape how risk is distributed across the workforce.

Over time, deregulation and the commercialisation of safety have narrowed public and industry definitions of what constitutes 'real' risk.⁷ This has led to a focus on catastrophic failures (e.g., sudden, visible events) while downplaying more pervasive but less visible harms such as stress, fatigue, and cumulative injury. These everyday risks are harder to quantify and are often excluded from dominant safety narratives.

As a result, the structural forces that shape exposure to harm are frequently obscured. The burden of risk falls heaviest on those with the least economic power, as people with limited choices are more likely to accept unsafe work out of necessity, while others in more secure or better-paid roles remain comparatively protected.⁸

"Those who procure the work don't necessarily feel the impact of poor safety. The burden is carried by the health system, ACC, and the people doing the job."

Understanding this uneven distribution also requires attention to the broader economic institutions that shape employer behaviour. Institutional economics helps explain how different market structures influence firms' capacity and incentives to invest in safety. In liberal market economies like New Zealand, labour is often treated as a flexible, interchangeable input, and coordination across sectors tends to be limited. By contrast, coordinated market economies better support longer-term investments through stronger institutional networks and strategic inter-firm relationships⁹, creating conditions generally more conducive to sustained safety practices.

"All we asked for was a fair share of wallet – it was still less than 10% of the product's value, in exchange for delivering more efficiency, better safety outcomes, and certainty across our supply chain."

"Margin's not a dirty word. Without a sustainable business, you cannot keep investing in safety and innovation."

Firms told us that securing a 'share of wallet' for safety investments is critical, underscoring the role of market structure. The hard reality is that safety upgrades require upfront spending, while the returns are slower and often shared across the wider sector. This makes investment a difficult sell when margins are tight or client budgets are fixed. Businesses that overcome this hurdle make the long-term benefits concrete for clients, framing them in terms of productivity gains, reliability, and reduced disruption that directly support the client's own goals.

"It's a short-term pain for a long-term gain... in the short term [safety] impacts your efficiency, but over a period of time I believe it does the opposite because you don't have those lapses. You don't have those incidents as frequently."

7 Almond & Esbester, 2016

8 Social reproduction theory emphasises that the burden of risk is disproportionately borne by those with the least economic power, particularly marginalised groups such as young people, racialised individuals, migrants and other minorities (Bhattacharya, 2017; Fraser, 2013).

9 Hall & Soskice, 2001



In practice, firms with more stable demand are likely to be better able to prioritise long-term value creation, skills development, and workforce stability within their business models, making them more likely to invest meaningfully in safe work.

But businesses facing price pressure can also enable safety capacity in different ways. There are clear examples where procuring longer-term contracts can enable smaller to medium sized businesses to make an investment in safety, knowing they have the guaranteed income for more than a year.

In some cases, firms under less price pressure can negotiate shared safety investments by asking clients to contribute via long term contracts in exchange for safety and operational investments that take time to bear fruit, backed by salient promises of productivity gains such as stable staffing, reduced processing time, and reliable capacity.

In highly competitive markets (such as construction), asking for this share of wallet is more difficult. Thin margins and weak client coordination often lead to short-term thinking, while upstream clients may avoid financial consequences, creating incentive mismatches and room for reactive, ad hoc safety efforts. We know businesses in these industries can still succeed by competing on trust and reliability, although this requires a strong commitment to in-house learning and development, and can be harder to sustain for smaller firms trading on price alone.

It therefore is the responsibility of the clients and larger companies to think differently about how they can support those lower down the supply chain – not necessarily financially but in terms of longer, more stable contracts.



Key takeaway: secure and share how safety is funded, through procurement, using collaboration to amplify impact across sectors.

► Lesson 2

Monitor hidden benefits; particularly the value of worker retention and reduced reputational risk.

Emerging evidence and insights from local business leaders suggest the productivity benefits of strong safety systems are often hidden and substantially undervalued and rarely communicated.

Headline benefits of improving safety outcomes include significantly improved staff retention, fewer work-site disruptions, enhanced reliability, and reduced reputational risk. One business leader highlighted a 54% higher return from fully graded/experienced workers compared to new trainees, underscoring clear retention gains. Other firms substantially reduced turnover by improving work quality through automation and heavy investment in upskilling.

"We've grown our market share without competing on price. Some customers value the productivity gains, others the safety improvements, but both come from the same investment."

These real-world examples align with research findings. A study of high-performing firms in Ontario, Canada found that integrated safety and productivity through joint management systems and open communication, achieved gains via improved quality assurance.¹⁰ Similarly, a deep dive into the UK construction sector across all firm sizes found health and safety to be a key catalyst for productivity improvement (see also Figure 6).¹¹

Critically, many of these benefits go unmeasured and unrecognised by New Zealand firms, representing a missed opportunity. By benchmarking operational and safety metrics, businesses can better understand the high costs of less visible drivers such as staff turnover and the value of investing in safety to retain skilled staff (for example, nearly 40% of construction workers were hired within the last year, highlighting a clear opportunity for firms with lower turnover to leverage their firm's skills, reliability, and industry knowledge as a competitive advantage). For one leader, the value of lower turnover was around \$500,000 a year in direct recruitment costs alone, and total benefit likely a factor of 2x or 3x higher.

"Turnover's dropped from more than 30% to closer to 10%. That's the payoff from putting people in safer, higher-paid, more respected roles. Sometimes you take a leap of faith, but if you treat people how you'd want to be treated, retention follows."

¹⁰ Shevchenko et al. (2018)

¹¹ Meng and Brown (2018)



New Zealand firms also spoke to us about the hidden but immense costs of weak safety practices, referring often to the avoided cost of reputational damage as a motive for better practices, as well as the costs of stop time, re-doing poor work, increased ACC levies, high staff turnover, and the inefficiencies of ad hoc processes associated with poor safety records. Often, leaders also reflected on the potential emotional toll of a serious safety incident, describing the anticipated weight of remorse and moral responsibility when imagining facing injured workers or their families.

This challenges New Zealand firms to dispel the myth that health and safety harms productivity.

Firms were very clear: concerns about productivity losses arise predominantly when thinking short-term. Rather by strengthening their own practices, organisations retain (and grow) their brand value and critically position themselves as employers of choice and reliable trading partners.



Key takeaway: track and promote the productivity gains that strong safety practices quietly deliver over the longer term.

► Lesson 3

Adequate resources prevent major failures, while training improves the quality of judgements which sustain day-to-day outcomes.

Work design and technology prevent routine erosion, but need to be backed by a sense-making culture.

When workers face pressure to prioritise production over safety, well-designed physical environments, carefully organised in terms of space and barriers, combined with clearly communicated priorities limit opportunities for unsafe shortcuts and reduce risk.

"Ninety percent of the time nothing bad will happen – but the 10% of the time, the consequences are catastrophic."

In practice, business leaders told us they often hear people (across all levels of the business) say, *"I was trying to do the right thing"* after a safety incident. They acknowledge that deadline pressure sends mixed signals about the company's true priorities, shaped by incentive structures, leadership cues, and frontline perceptions of job security, with risks especially high when work is isolated and resembles that of small businesses or contractors. These moments reveal the tension workers face as they navigate competing commercial demands alongside their personal and collective wellbeing.

"We don't write safe work instructions in the office, we get the front line to tell us how the job is really done and build it from there."

Good work design and technology can strengthen safety by setting limits or automating monitoring to reduce poor judgment and pressure-driven decisions. For example, vehicle tracking monitors driver behaviour and AI alerts warn workers of nearby forklifts. These measures also promote planned, quality work and help build caring workplace cultures that improve staff retention even when immediate safety benefits are not obvious.

Even so, challenges remain. A review of construction sector harm incidents highlighted problems with hazard recognition, supervision, and competency under time pressure that undermine the effectiveness of critical controls.¹² This underscores the importance of addressing the gap between 'work as done' and 'work as imagined'. Routine erosion, such as skipping control checks or accepting degraded barriers, became more frequent when risk was normalised and productivity goals took precedence.

"We've got to close the gap between work as imagined and work as done – that's where safety and productivity are won or lost."

¹² Selleck, Hassall, and Cattani's (2022)



The key barriers to effective use of critical controls identified in Selleck et al. include:

- Complacency in familiar or high-risk tasks
- Difficulty adapting safety decisions as conditions change
- Reactive supervision and poor planning amid production pressures
- Individuals making safety decisions without sufficient system guidance, leading to risky deviations
- Systemic drift with unnoticed degradation of safety barriers.

This means that for safety to be meaningful, it must be embedded in how work is performed rather than treated as a separate process or compliance add-on, as has often been the case. This argues for a sense-making culture, reflecting culture oriented to understanding, reconciling and changing how people interpret and respond to complex situations, over a decision-making culture focused too primly on how things ought to be.¹³ Training, leadership, and trust, but also carrots and sticks, play vital roles in developing this capacity.



Key takeaway: involve workers to design work to minimise risk and train people to make sound safety decisions under pressure, while continually verifying controls are working as planned.

13 Zanko and Dawson (2012)

► Lesson 4

Integration happens at the level of routines, middle managers, and systems that closely link safety and operations.

Firms that improve health and safety effectively integrate it directly into operational systems rather than treating it as a separate process.

A common challenge for business leaders is reconciling the gap between 'work as imagined', referring to the ideals of how tasks are designed and planned, and 'work as done', reflecting how they are performed in real time and under pressure. Business leaders we spoke with emphasised how safety ideals often diverge from operational realities, making alignment of real pay incentives crucial.

"Good business is safety, and safety is good business. You cannot flick a switch – it's a journey of repeated messaging, no-blame culture, and getting operational leaders to see safety as their first priority."

Improvements occur at two levels. **Gradual, continuous adjustments** embed safety into daily routines, requiring cooperation, sustained attention, and ongoing efforts to keep safety communications clear and engaging for workers. Meanwhile, **deeper transformational changes** such as investing in automation, redesigning work organisation and workflows, or implementing new training can unlock co-benefits by better integrating safety and productivity. However, leaders noted this is not always possible, as critical controls or training may take priority, and at times pragmatic risks are accepted to maintain operations.

"If I reflect on where our highest safety issues have been... it's actually been with our contractors... you're calling an electrician... the lady's never been here before... you can't do any work until you've filled in this paperwork and done this training. But again, it just has to be a non-negotiable... if an incident happens... I lose a lot more than that."

Firm structure also shapes safety outcomes. Large firms generally have the capacity to invest in automation, training, and work design, but these benefits are unevenly distributed across their operations. Subunits that operate like small businesses, such as offsite sales teams or night-shift crews, often have weaker safety records. The situation is further complicated for contractors working on-site, who must often be trained to meet the firm's safety expectations, which can involve significant costs. However, it is not always clear that procurement teams fully recognise the value of these skills when hiring contractors, or understand the work being done, **representing an opportunity for larger firms (and especially government procurement agencies) to review and improve their practices.**

"Clients who care only about cost will get poorer safety outcomes. The mature ones engage early, involve the supply chain, and procure for track record as well as price."¹⁴

¹⁴ See also The Forum's 2020 case study on supply chain leadership at New Plymouth District Council www.forum.org.nz/resources/stevenson

Medium-sized firms tend to innovate through adaptability, while smaller firms face greater risks of falling behind. This contributes to ‘the bulge’ – a growing group of firms in industries perceived as low harm that are unlikely to be inspected and are increasingly left to self-regulate.¹⁵ In practice, this dynamic often includes many smaller firms, further compounding challenges in maintaining consistent safety standards.

“People watch what leaders do far more than what they say. If you don’t show safety is a priority, no one else will either.”

“If the leader goes out to site and talks about what’s likely to go wrong, it sends a whole different set of signals than just asking when the job will be finished.”

In larger and medium-sized firms, middle/frontline management plays a crucial role in safety performance. They need clear accountability mechanisms, such as pay-at-risk schemes, and must also hold others accountable. Acting as a link between strategy and daily operations, middle managers apply their expertise in understanding contexts (‘know-what’), practical problem-solving (‘know-how’), and relational networks (‘know-who’) to identify risks often missed by senior leaders.¹⁶

This means they use informal tools like trust, conversation, and peer judgment alongside formal systems to help safety adapt in real time. For this to succeed, however, senior leadership must communicate clearly and consistently about safety’s importance. Without such support, managers’ efforts are vulnerable to becoming compromised by competing productivity demands.

In Appendix 1 we summarise best practices at the routine level based on Shevchenko’s study of ten firms in Ontario, along with a survey of 198 firms. The study emphasises that change must occur on multiple levels: routine adjustments embed safety into daily work, while transformational changes reshape how work is designed and planned. We have also added the reflections of New Zealand business leaders to this.



Key takeaway: embed safety into daily operations so it is part of how work gets done, not an add-on.

¹⁵ Black (2005)

¹⁶ Callari et al. (2019)

7. Conclusion

Well-designed work environments are fundamental to a productive and inclusive organisational culture.

Businesses hold significant control over their own safety practices and can drive meaningful internal change that improves employee wellbeing and retention, mitigates long-run reputational risk, and supports better operational outcomes. However, lasting improvements depend on embedding safety deeply within everyday routines, shared values, and decision-making, and taking a long-term view of productivity. To do so, organisations must engage in continuous learning and sense-making to close the gap between how work is planned ('work as imagined') and how it actually happens ('work as done'). This adaptive approach enables safer, more resilient workplaces that respond effectively to frontline realities and economic pressures.

Periodic resource investment is still needed to design work environments and systems that minimise risks by default. Given the potential to improve productivity by reducing training costs, improving processing times and reliability, and lowering ACC levies, firms should seek opportunities to share these costs. The capacity to do so depends on market structure and firm size, but in all cases, collaboration is key. Options include changing procurement processes to prioritise safety more explicitly or finding ways to educate clients about the productivity benefits of specific investment programmes, and the associated pricing implications in exchange for doing more efficient work.

By designing work environments and organisational systems with thoughtful layout and workflow design, firms can further reduce risks and minimise opportunities for human error or shortcuts. When safety and productivity are integrated through joint management systems and aligned incentives, organisations can achieve improvements in both simultaneously.

To ensure sector gains are sustainable, clear and coordinated system stewardship from regulators remains essential. While organisations must lead within their own walls, effective governance underpins higher safety standards and system-wide maturity.

Government, and particularly WorkSafe NZ, has a critical role to play in supporting firms to collaborate strategically and share the costs of safety, especially in sectors where skills shortages persist or industry structures are highly competitive and fragmented.

Guided by up-to-date evidence on the alignment between health, safety and productivity, safety becomes a core feature of high-performing sectors.

Appendix 1: Adapted summary table of Shevchenko et al.'s study of joint management systems at the level of daily routines

Routine	Enhances safety and operational outcomes	Harms safety and operational outcomes	Insights from NZ firms
Process focus			
- SOPs exist and are followed - Formal continuous improvement - Long term planning	- Develops and follows SOPs for all work - Continuous improvement used to prevent future problems - Clear improvement trajectory into future	- SOPs are either not developed or followed - Problems are reacted to as they occur - Ad-hoc/day-to-day management systems	Use language and formats workers relate to, and keep processes 'alive' through regular toolbox talks that loop back on how work is actually done.
Accountability for safety			
- Who is accountable - Operations manager has responsibility for safety - Safety rules enforced - Safety is a component of pay at risk/performance appraisal	- Everyone - Operations manager responsible for safety outcomes - Rules violations are disciplined - Operational workers and managers are measured and rewarded for working safely	- No one or workers not accountable - Operations manager not responsible for safety outcomes - Rules violations are not disciplined - Operational workers and managers are measured and rewarded only for meeting production goals	Support leaders to set their own KPIs and provide ongoing coaching, making it clear that safety is a non-negotiable alongside production goals.
Design of work			
- Automation - Job (re)design explicitly considers safety - Hazard control principles - Ergonomics	- Automation explicitly used to address dangerous work - Job (re)design considers safety and productivity - Hazard assessments are part of process (re)design - Ergonomics part of process re(design)	- No negative equivalent - Job re(design) considers only productivity - Hazard assessments are not done - Ergonomics considered only after equipment is installed, if at all	Fund safety-focused redesigns by securing a 'share of wallet' from clients, framed in terms of the productivity gains they will receive.
Communication			
- Content: frequent safe work - Content: operational priorities - Method and direction of communication	- All managers stress safe work in their communication to operational workers - Safety is one of the top operational priorities and this is communicated actively 2-way communication	Top-down communication	Make it two-way to spot gaps between work as planned and work as done. This allows course corrections, aligns priorities, and reinforces culture, especially when good safety choices are openly recognised and celebrated.
Human resource management			
- Strategy - Performance management: formal performance appraisals merit-based raises and promotions - Highly skilled and experienced workers - Cross training	- High quality work environment - Performance assessments include criteria which give safety a heavy weighting - Workers are seen as a storehouse of knowledge - Operational workers can do multiple tasks	- Control based work environment - Performance assessments are operationally focused - Workers are not a source of knowledge/switchable - Operational workers do a single task	HR can set the safety framework and hold the carrots and sticks, but operational managers must own it day to day, using their own accountability levers for themselves and others, embedding safety into performance reviews and linking it to incentives. Carrots are surprisingly underused, with far fewer performance bonuses than penalties.

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