Supply chain mapping and risk identification tools

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About this report

Internationally, legislation has been enacted to encourage businesses to map their supply chains, identify human rights and worker exploitation risks, and to take action. There have also been directives issued in relation to reporting on broader ESG (environmental, social, and governance) risks and considerations.

A number of tools and resources have been developed and promoted to support these processes. The tools and resources are usually technology-based and private sector provided. The tools support businesses to map, identify, and act on risks.

For organisations trying to do the right thing, it is challenging to decide:

- whether to invest in and adopt these tools, and

- which of the many options would be the most suitable.

This report summarises the tools and resources available and tests their relevance against fictionalised businesses and some assessment criteria relevant to the New Zealand context.

The intention of the report is to assist organisations to navigate the range of options available. This report should be used in conjunction with organisations undertaking their own assessment for their own context, and engaging directly with suppliers.

Background and context

Modern supply chains are complex

Modern supply chains can span a diverse range of suppliers and contracted parties, including producers of raw materials, suppliers of further inputs, and various sub-contractors. This means that primary buyers (the "company" in Figure 1) can be supplied by a large number of different parties, including those they do not have a direct business relationship with. It also means that investors and consumers can be removed from producers and suppliers by quite a few steps.

The range of actors involved can mean that the companies that are responsible for designing or marketing goods and services and that have a direct relationship with consumers may not be familiar with the sources of their inputs or the companies providing them. This could be because of physical distance, or because of distance within the supply chain, as chains often have multiple levels of suppliers and intermediaries (ILO, 2019).

Supply chains can hold risks of labour exploitation

The role that supply chains play in facilitating risks of labour exploitation has increasingly become an area of focus over the past two

Figure 1. Conceptualising a supply chain
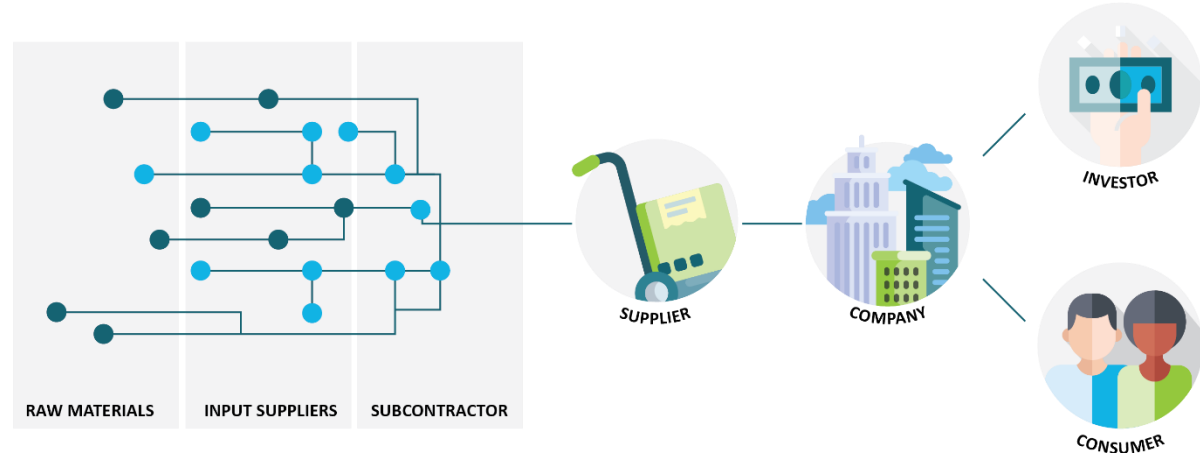
Source: Adapted from knowthechain.org

decades, particularly because of a number of high-profile cases that highlight how responsibility for protecting workers' rights is spread across multiple regulatory regimes. Here in the New Zealand labour market, there were concerns about exploitation of subcontracted migrant labour in telecommunications (Martin & Baddeley, 2019) and in residential construction (Xia, 2021). Such risks are further exacerbated with supply chains extending across trans-national boundaries and complex regulatory regimes.

Regulatory changes have also occurred within New Zealand's major trading partners and have become increasingly prevalent in international trade agreements. For example, the agreement between New Zealand and the United Kingdom of Great Britain and Northern Ireland contains provisions related to forced labour, modern slavery, and human trafficking in chapter 23 (New Zealand Government & United Kingdom of Great Britain and Northern Ireland Government, 2023).

Resources and tools to support supply chain mapping and risk identification

To support assessment of supply chain risks, reporting, and required due diligence (if any), a range of resources and tools have been developed – by governments, NGOs, and the private sector. The resources and tools are available to New Zealand businesses, and some are already adopting them.

The landscape of resources, tools, and guidance is vast and can be confusing to navigate, to understand which ones might best meet business needs and the legislative requirements (in New Zealand and for export markets) – particularly for small and medium enterprises (SMEs), which are the majority of businesses in New Zealand.

Limitations

This report is not a review of all potential resources and tools. We only received further details and information on a subset of suppliers through an online request for information (RFI).

The scope of this report excludes a stocktake and assessment of resources and tools for government procurement. The resources and tools available to government procurers are often bespoke to that jurisdiction and their related regulations. Examples are:

- the GRS Inherent Risk Identification Tool (the IRIT, developed by the Office of the NSW

Anti-slavery Commissioner with support from the Institute of Transport and Logistics Studies at the University of Sydney Business School.

- The MSAT platform, the modern slavery risk identification and management tool, has been developed by the UK Cabinet Office, in association with NQC.

The international regulatory landscape is changing, so the tools and resources supporting regimes are constantly evolving. The data and information collected for this report occurred in February to March 2024. Organisations using the information in this report should undertake their own assessments of current offerings, and engage directly with suppliers to inform any decisions to adopt a particular resource or tool.

What do we mean by "resources" or "tools"?

In the context of supply chain mapping and risk assessment, tools and resources are usually a software platform that pulls available information on international risks in supply chains, which is then matched to information on a business's supply chain (which they usually enter themselves or assisted by the supplier) to determine levels of actual or potential worker exploitation risk.

The exploitation risks are measured by suppliers in various ways. They can be based on a combination of:

- data on the financial (and other) performance of various industries and companies (at different levels of granularity)
- prevalence based on media, country, investigations, and intelligence reporting on prosecutions and risks (for example, US Department of State's Trafficking in Persons report), available indexes (such as the Global Slavery Index)
- AI, web crawling, and web scraping
- data from a range of sources, for example, shipping logs and customs
- data and information from supplier assessment questionnaires (SAQ), and
- in-house subject matter expertise.

The user/client interface is usually a technology platform so that risks can be tracked, and various reports can be pulled out.

New Zealand landscape of resources and tools focused on business and human rights

New Zealand is a nation of small businesses

Reflecting its smaller size, New Zealand has a higher percentage of micro, small and medium-sized enterprises than other countries, and what is considered to be a large business is generally smaller in comparison to those overseas. Many small businesses in the US would be considered a large business in New Zealand.

Table 1 shows the different employment definitions for business size for the US, Australia, the UK, and New Zealand.

Table 1. Comparison of business size definitions using number of employees

	US	Australia	UK and EU	New Zealand
Micro	0–9	0–4	0–9	0–4
Small	10–99	5–19	10–49	5–19
Medium	100–499	20–199	50–249	20–49
Large	500+	200+	250+	50+

Source: MBIE (2020) *Briefing for Incoming Minister for Small Business*

97% of all businesses in New Zealand – including self-employed – are small businesses, defined as those with fewer than 20 employees (MBIE, 2023). The Productivity Commission has also identified that New Zealand firms often engage in international exports relatively early in their lifecycle, while firms in larger domestic markets or adjoining markets within free-trade blocs are usually much larger before seeking to export goods or services (New Zealand Productivity Commission, 2021).

New Zealand businesses are exposed to the same worker exploitation risks, both internationally and domestically, as businesses in larger economies but may not have the same capacity or capability to identify relevant risks, or to act.

Employment New Zealand and New Zealand Trade and Enterprise provide some guidance, but there are many resources and tools available in the market

Employment New Zealand provides guidance on end-to-end assurance systems and processes that focus on improving conditions for (domestic) workers. There is also reference to guidelines and principles outlined by the UN, the OECD, and legislation in other jurisdictions (Employment New Zealand, 2023a, 2023b, 2023c).

New Zealand Trade and Enterprise also provides resources and case studies, and webinars, on how businesses in New Zealand are affected by modern slavery legislation, and how to mitigate risks in a supply chain.

These resources and tools need to be considered in the context of domestic regulatory compliance and support for New Zealand firms to maintain high degrees of international trade competitiveness.

There are also an array of, mostly technology-driven, resources and tools that are available to businesses who need to, or want to, take further steps. The resources and tools are of varying quality, have different price points, and require different levels of business resourcing to operate and use effectively.

The assessment framework used in this report

The [Ten Principles of the UN Global Compact](#) and the [UN Guiding Principles on Business and Human Rights](#) recommend organisations take a 6-step due diligence cycle (Figure 2):

1. **Policy development:** This might be committing to a particular strategic position in the labour market such as developing, implementing, and monitoring a supplier code of conduct.

2. **Impact assessment:** Usually through supply chain mapping, identification of actual and potential risks, and risk assessments. *This is the focus of this report.*

3. **Taking action:** Through supplier education and training, contract management, and working with suppliers to remedy/address risks.

4. **Tracking performance:** Tracking how initiatives are faring – for example, reductions in complaints related to worker exploitation, and reducing the number of suppliers/sites with high potential and actual risks through audits.

5. **Communicating performance:** Reporting publicly how actions are progressing.

6. **Remedy and grievance mechanisms:** Contact points for where workers can report workplace abuses, lodge complaints, and in some cases receive legal advice.

Figure 2. Six step due diligence cycle
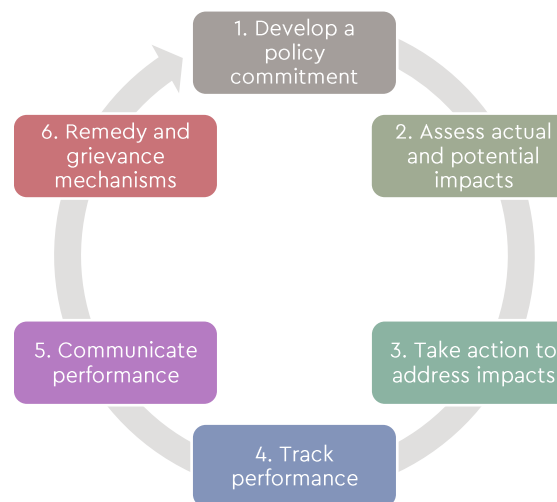
Source: Business & Human Rights Navigator (UN Global Compact, n.d.)

How we assessed the different tools and resources

There are lots of different tools and resources that focus on impact assessment. We assessed the tools using the following criteria (Figure 3):

- **Fit-for-purpose:** Whether the tools enabled a business to map their supply chain and/or assess/identify worker rights risks.

- **Market uptake:** How many organisations currently use the resource or tool, what sectors the resource or tool is aimed at, and would it be readily acceptable in regulatory regimes of major trading partners.

- **Ease of use/resource intensiveness:** Whether the resource or tool requires specialist skills, the extent to which it can be "plug and play", and whether it requires a long time to master it.

- **Price:** Value for money, the pricing model, and how it compares to similar offerings.

- **Suitability for organisations with less than US$1 million revenue:** Whether it can be scaled for, or used by, smaller businesses. Whether the tool or resource is already used in the New Zealand market.

We identified resources and tools through a desktop search, and issued an online RFI to 65[1] suppliers for which we were able to source a contact email address to support our assessment. Out of 46[2] suppliers who received the RFI, responses were received from 31 suppliers – the response rate was 67% which is a very good response rate for an online survey.

Note that this report provides a general overview and is a point-in-time assessment. It is based on limited information provided by suppliers and information that is available publicly.

The field of human rights risk management is moving quickly. Organisations deciding what tools and resources to use should not rely solely on the information presented in this report, and should undertake their own due diligence, assessment, and engagement with suppliers.

A profile of suppliers is included in Appendix 2.

Figure 3. Assessment framework

| Fit-for-purpose | Market uptake | Ease of use/ resource intensiveness | Price | Suitability for New Zealand context |

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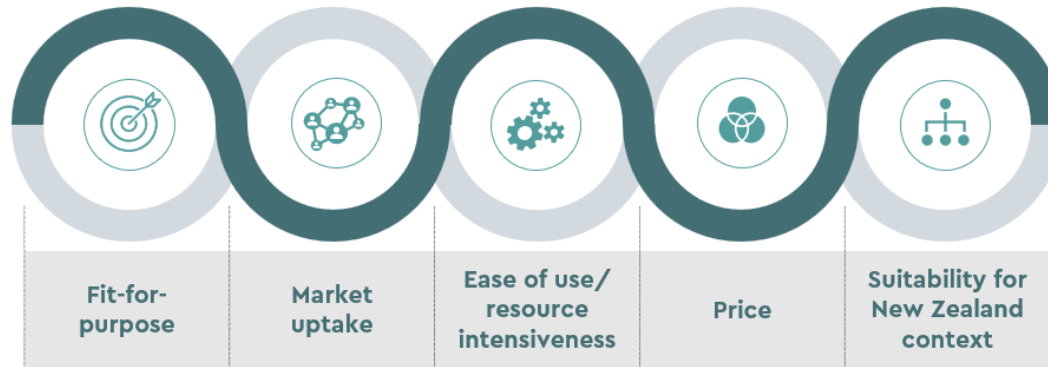
[1] The number of suppliers that had a contact email address to direct the request for information.

[2] 19 supplier emails were not able to be delivered so we excluded them from the response rate calculation.

Ease of use, and price, of tools and resources

Suppliers thought that their supply chain mapping tools were easy to use

Most suppliers rated their tools as being "easy" or "very easy" – both in onboarding and induction, and ongoing use and maintenance (Figure 4). A few did indicate that their tools could be quite resource intensive to use.

This means that organisations looking to adopt tools (particularly smaller businesses) should make enquiries as to what skills and resources might be required to operate, use, and get the most out of the tools.

Suppliers thought that their risk identification tools were easier to use than the supply chain mapping tools

Most suppliers rated their risk identification tools as being "easy" or "very easy" to use (Figure 5). Compared to supply chain mapping tools, the onboarding and ongoing use of risk identification tools appeared to be easier.

Figure 4. Most suppliers said that their supply chain mapping tools were "easy" and "very easy" to use
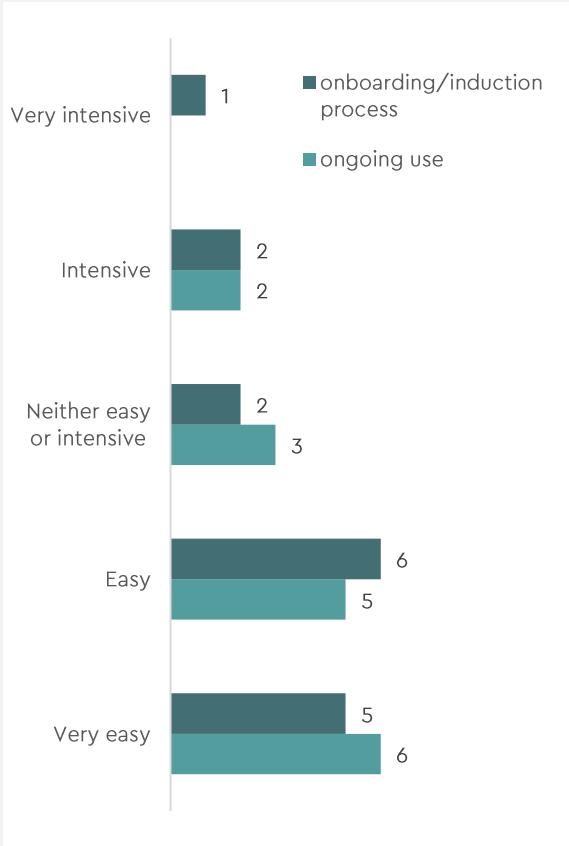
Source: MartinJenkins RFI

Figure 5. Most suppliers said that their risk identification tools were "easy" or "very easy" to use
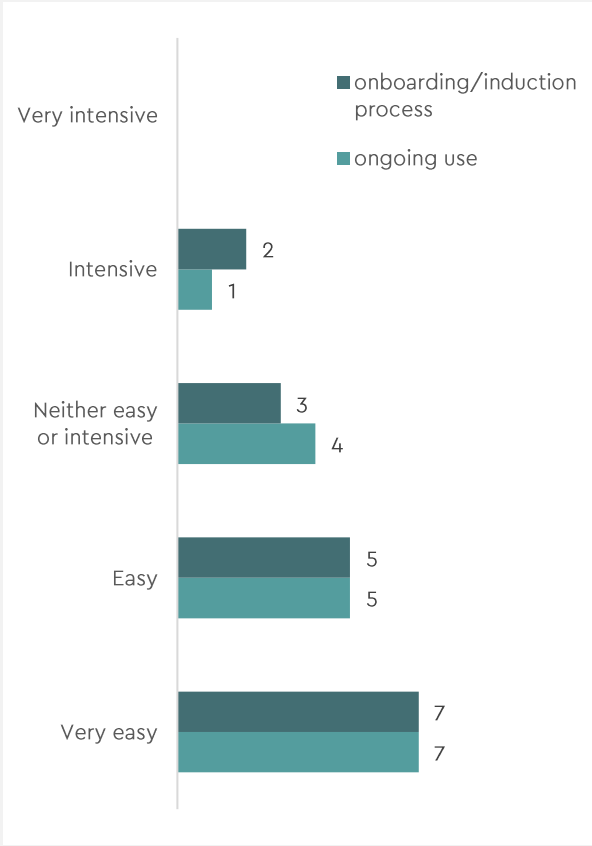
Source: MartinJenkins RFI

Suppliers provide tools on subscription and professional consultancy fees basis, with a starting point of US$1,000

Most tools are provided as part of membership or subscription fees (Figure 6). The price of subscriptions depends on an organisation's:

- annual revenues,
- the number of suppliers, and/or
- how many risks and industries businesses wanted to track.

This allows for flexibility so that organisations can choose options that meet their needs and size.

For both supply chain mapping tools and risk identification tools, just over half had annual fees between US$1,000 and $US10,000, with the remainder between US$10,000 and US$100,000 (Figure 7).

Suppliers differentiate their tools and services in a number of ways

We asked suppliers what their point of difference was. Descriptions included:

- Depth of subject-matter expertise and keeping up with legislative developments.
- The number of tiers of a supply chain where there is robust information.

Figure 6. Tools are provided through subscriptions or professional consultancy fees
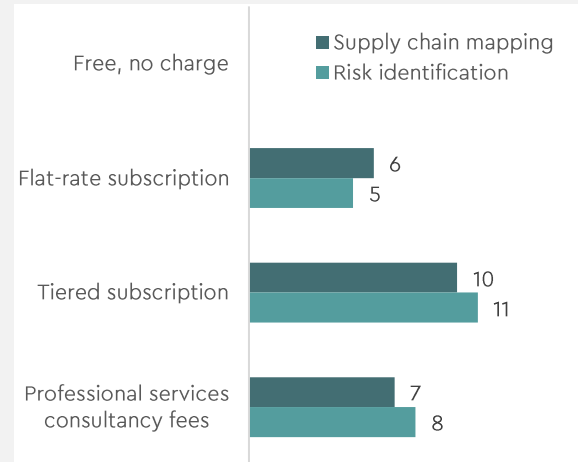
Source: MartinJenkins RFI

Figure 7. On an annual basis, the starting point for all tools was between US1,000 and US$100,000
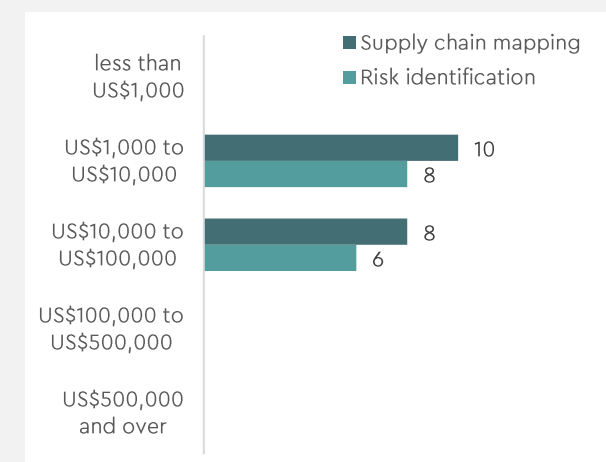
Source: MartinJenkins RFI

- Global presence and ownership.
- Tailored and customised services.
- Benchmarking.
- Collaborations with legal professionals.
- Onsite presence and onsite auditors.
- Platform enables businesses to track and monitor a number of risk management areas.
- Use of predictive data and multiple data sources.
- Timeliness and affordability.

- Australian and New Zealand-focused.
- User-friendly interface.

When choosing a tool, organisations should decide what features are most important to them.

Most tools were fit-for-purpose

Our analysis and assessment looked at to what extent the tools supported supply chain mapping and risk identification (that is, were fit-for-purpose). Most were fit-for-purpose.

Overall assessment and conclusions

A shortlist of tools and resources that may most feasibly meet the needs of New Zealand businesses

There are many different tools and resources available. Our initial review identified 70 different suppliers, and it was highly likely that the list was not exhaustive (Appendix 1). This large group of potential suppliers may make it difficult for New Zealand organisations to determine how, and to what extent, they should invest.

We shortlisted the identified tools using five criteria and applied a star rating (Table 2):

1. Fit-for-purpose.

2. Market uptake.

3. Ease of onboarding and ease of use.

4. Price.

5. Suitability for organisations with less than US$1 million revenue.

The tools are ranked in order from highest rating to lowest rating (Table 3).

This is not an assessment of all potential resources and tools. We only received further details and information on a subset of suppliers through a request for information.

The international regulatory landscape is changing quickly, so the tools and resources that support the regulatory regimes are constantly evolving. Organisations should undertake their own due diligence and assessment of offerings.

Table 2. Rating scale

Rating	Fit-for-purpose	Market uptake	Ease of onboarding and use	Price (starting annual price)	Suitability for smaller organisations (most clients in specific annual revenue bands)
★ ★ ★ ★ ★	Provides supply chain mapping and risk identification tools	Has NZ clients	Very easy	Less than US$1,000	Less than US$1 million
★ ★ ★ ★			Easy	Between US$1,000 and US$10,000	Above US$1 million and below $US10 million
★ ★ ★	Provides either supply chain mapping or risk identification tools, not both	Has Australian clients	Neither easy nor intensive	Between US$10,000 and US$100,000	Above US$10 and below US$25 million
★ ★			Intensive	Between US$100,000 and US$500,000	Above US$25 million and below US$100 million
★	Provides a related service	Clients in the rest of the world	Very intensive	US$500,000 and over	More than US$100 million
	No dedicated tool for supply chain mapping or risk identification	No information provided	No information provided	No information provided	No information provided

Table 3. Assessment of tools and resources

Tool	Key features	HQ	Sector/ industry focus	Fit-for-purpose	Market uptake	Ease of onboarding and ease of use	Price	Suitability for organisations with less than US$1 million revenue
QIMA / QIMAone	Services across the 6-steps, and across broader ESG.	Hong Kong	Agriculture, Manufacturing, Wholesale, Retail, Professional	★★★★★	★★★★★	★★★★★	★★★	★★★★
Novata, ESG reporting	Services provided across broader ESG.	UK	All	★★★★★	★★★★★	★★★★★	★★★	★★
iPRO: MSART, Modern Slavery Assessment & Reporting Tool	Technology-focused, not consultancy.	Australia	All	★★★★★	★★★★★	★★★★★	★★★	★
FairSupply	Services provided across broader ESG.	Australia	All	★★★★★	★★★★★	★★★★★	★★★	★
Ethixbase360: EB360	Services across the 6-steps, and across broader ESG.	UK	All	★★★★★	★★★★★	★★★★★	★★★	★
ArcBlue: msX	Procurement and supply chain expertise. Asia Pacific presence.	New Zealand	All	★★★★★	★★★★★	★★★★★	★★★	★
Achilles: MyAchilles Platform	Services across the 6-steps, and across broader ESG.	UK	All	★★★★★	★★★★★	★★★	★	★★★★

Tool	Key features	HQ	Sector/ industry focus	Fit-for-purpose	Market uptake	Ease of onboarding and ease of use	Price	Suitability for organisations with less than US$1 million revenue
FRDM	Uses shipping logs and predictive data.	US	All	★★★★★	★★★	★★★★★	★	★★★
Intertek SAI Global: Inlight	Services provided across broader ESG.	Australia	All	★★★★★	★★★★★	★★★★★	★	
Verisk Maplecroft	Services across the 6-steps, and across broader ESG.	UK	All	★★★★★	★★★	★★★★★	★	★
Sedex	Operates SMETA, which is a social compliance audit standard, similar to NZ GAP and BRC.	UK	All	★★★★★	★★★★★	★★★★★	★★★	
TraceSCI: ESG RI	Services across the 6-steps, and across broader ESG.	Australia	Mining, Manufacturing, Construct, Wholesale, Retail	★★★★★	★★★	★★★	★	★
amfori BSCI: amfori Sustainability Platform	Global business association. Membership-based.	Belgium	Manufacturing, Wholesale, Retail	★★★★★	★★★★★	★★		
EcoVadis	Services across the 6-steps, and across broader ESG.	France	All	★★★★★	★★★★★	★★		

Tool	Key features	HQ	Sector/ industry focus	Fit-for-purpose	Market uptake	Ease of onboarding and ease of use	Price	Suitability for organisations with less than US$1 million revenue
Portt	Spend management team based in Australia and New Zealand. Plug-in core modules.	Australia	All	★★★★★	★★★★★			★

Overall assessment

Because some suppliers didn't provide us with enough information to make appropriate judgements, we used the star ratings to group the tools and resources into three clusters.

- Cluster 1: Highest rated across the assessment criteria. Less expensive than other options and relatively easy to use. Evidence of New Zealand clients using the tool, as well as smaller organisations.

- Cluster 2: Relatively high ratings across the assessment criteria. Existing clients were more likely to be (or mostly) large, multi-national enterprises (MNEs).

- Cluster 3: Did not provide enough information for assessment. A more expensive and resource intensive option compared to others.

Cluster	Organisation and tool	Supply chain mapping	Risk identification	Comment
1	QIMA: QIMAone	●	●	
	Novata: ESG reporting tool	●	●	– Highest rating tools.
	iPRO: MSART	●	●	– Had New Zealand-based users, and users included smaller-sized organisations.
	FairSupply	●	●	– Less expensive than other options and relatively easy to use.
	Ethixbase360: EB360	●	●	
2	ArcBlue: msX	●	●	
	Achilles: MyAchilles Platform	●		– Similar to the first cluster but had more users with very high revenues.
	FRDM	●	●	– With a high proportion of high revenue users, they might not be able to provide tailored, timely support to New Zealand SMEs.
	Intertek SAI Global: Inlight	●	●	
	Verisk Maplecroft: Industry Risk Analytics, and Global Risk Dashboard (GRiD)	●	●	
3	Sedex: Radar risk assessment tool	●	●	
	TraceSCI: ESG RI, and Coriolis ESG Reporting	●	●	– Did not provide enough information.
	amfori BSCI: amfori Sustainability Platform	●	●	– More resource intensive to use compared to others.
	EcoVadis: IQ Plus, Vitals, Ratings		●	
	Portt: Advanced Supplier Management		●	

Businesses may need tailored support to adopt and use tools and resources

We used three fictionalised business personas to guide our assessment and to support what might work for what type of organisation:

1. Small business that imports and supplies goods to retailers.

2. Medium-sized business that manufacturers and exports.

3. Large business that manufactures and exports.

Our assessment of the resources and tools available, and the fictionalised business personas, show that the landscape of supply chain management and risk identification tools for human rights and worker exploitation can be overwhelming, and organisations are likely to require one-on-one support to determine which tool would be most suitable.

Inter-operability, how widely tools are used by others, and considerations of broader ESG were also high on the list of concerns of businesses when determining what tools to invest in. But, in general, word-of-mouth is used to determine which tool to adopt.

Small business
Importer and supplies to retailers

Demographics

Employee count	3
Location	Auckland

Capability

- Low awareness of business and human rights issues.
- Low management capability.
- Has built up trusted business networks and is a member of an industry association.

Requirements

- **One-stop shop** – a single supplier or platform.
- Tailored information that's **suitable for a small business.**
- **Doesn't require new software**. Based on what they already have or can be easily integrated.
- **Standardisation.** Something that also helps with requirements from their buyers.

Decision
- Cluster 1

Medium-sized business
Manufacturer and exporter

Demographics

Employee count	65
Location	Bay of Plenty

Capability

- Very low capability and awareness. Believes that forced labour doesn't happen in New Zealand.
- Medium level of management capability.
- Low connections with business networks

Requirements

- **One-stop shop and platform** – ideally someone/something they already use and trust.
- **Tailored information** and they are guided through it.
- **Internationally recognised.** Resources and tools meet domestic requirements and are suitable for international markets and requirements.

Decision
- Cluster 1 or Cluster 2

Large-sized business
Manufacturer and exporter

Demographics

Employee count	170
Location	Canterbury

Capability

- Low capability and awareness of business and human rights issues. Concerned that it might require a lot of investment with little return.
- High management capability.
- Highly networked to business organisations, peer support, and sector working groups.

Requirements

- **Tools that are widely used already** – ability to piggyback off other companies who use that platform.
- **Tools that can be used to support other requirements and reporting.** Tools and resources that focus on human rights risks but also other factors like packaging, biodiversity, and environmental performance.
- **One source of truth.** Remove the need to have multiple sources of data and information housed in different places.

Decision
- Cluster 1, Cluster 2 or Cluster 3

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Appendix 1: Tools and resources longlist

This list comprises the longlist of suppliers we identified (65), with the following removed:

- suppliers that did not provide tools and resources within scope of this report (19)

- tools and resources we identified as not being fit-for-purpose once the request for information request was received, or after further desktop review (11).

35 tools and resources are listed in alphabetical order by the name of the supplier.

#	Provider	Supply chain mapping tool	Risk identification tool
1	Aavenir	• ServiceNow	
2	Achilles	• MyAchilles platform	
3	amfori	• amfori Sustainability Platform	• self/risk assessment feature is included in amfori BSCI (Business Social Compliance Initiative) and amfori BEPI (Business Environmental Performance Initiative). Both available on Sustainability Platform.
4	ArcBlue	• msX	• msX
5	Ceres Technology	• Nostradamus platform	• Nostradamus platform
6	ChainPoint (acquired by Source Intelligence)	• ChainPoint	
7	Cm3	• Cm3 platform	
8	Cority	• corityONE	• corityONE
9	Craft	• Craft platform	• Craft platform
10	EcoVadis		• IQ Plus, Vitals, Ratings

#	Provider	Supply chain mapping tool	Risk identification tool
11	ELEVATE EIQ	• ESG due diligence platform	• ESG due diligence platform
12	Ethixbase360	• EB360	• EB360
13	Everstream Analytics	• Everstream Discover	• Everstream Explore (risk identification) • Evertstream reveal (proactive)
14	Fair Factories	• FFC	• FFC
15	FairSupply	• FairSupply	• FairSupply
16	FRDM	• FRDM	• FRDM
17	Interos	• Interos platform	• Interos platform
18	Intertek SAI Global	• Intertek SAI Global: Inlight	• Inlight
19	iPRO	• the iPRO: MSART, Modern Slavery Assessment & Reporting Tool	• the iPRO MSART, Modern Slavery Assessment & Reporting Tool
20	Mekong Club		• Modern slavery resources and toolkits including risk assessment maps and modern slavery indicators
21	Moody's Analytics		• KYC Know Your Customer solution
22	Novata	• ESG reporting tool	• ESG reporting tool
23	Portt		• Advanced Supplier Management
24	Prevalent		• Prevalent Third-Party Risk Management Platform
25	QIMA	• QIMA / QIMAone	• QIMA / QIMAone

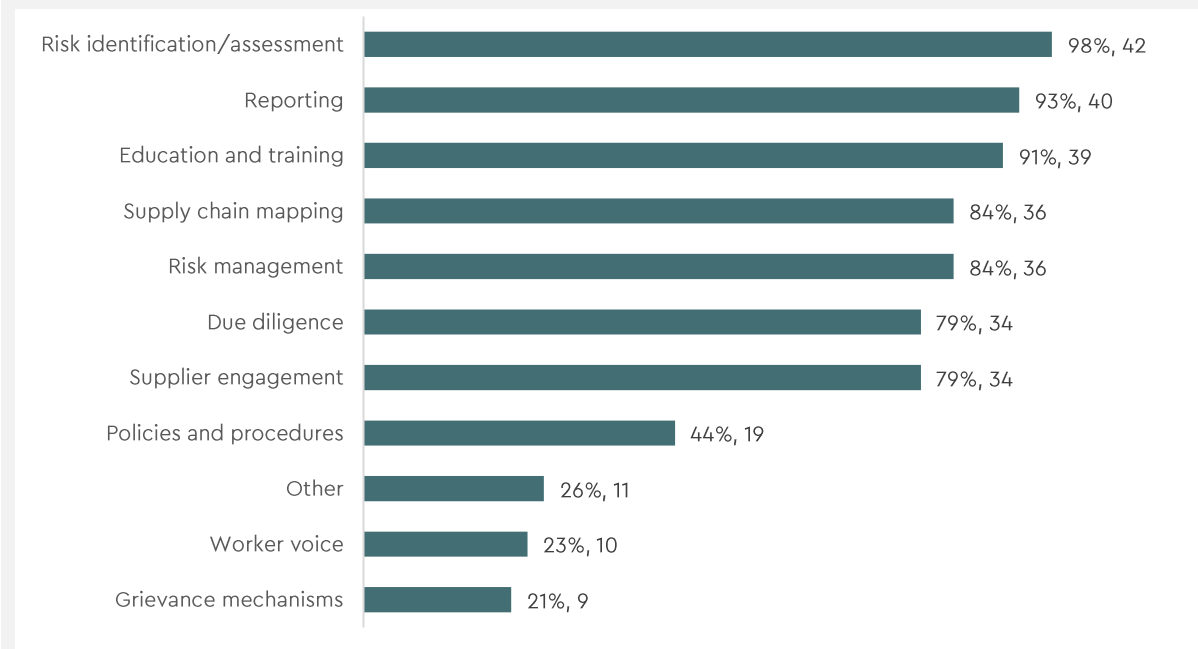| #	Provider	Supply chain mapping tool	Risk identification tool
26	RBA		• risk mapping and audit tools
27	Resilinc	• Resilinc platform	• Resilinc platform
28	Sedex	• Sedex platform	• Radar risk assessment tool
29	Sephera SCRM (was RiskMethods. Also acquired SupplyShift)	• Sephera • SepheraCloud	• Sephera • SepheraCloud
30	Sourcemap	• Sourcemap platform	• Sourcemap platform
31	TraceSCI	• TraceSCI: ESG RI	• Coriolis ESG Reporting
32	Transparency-One	• Transparency-One platform	• Transparency-One platform
33	University of Hull	• Supply Chain Risk Mapping Tool	• Supply Chain Risk Mapping Tool
34	Verisk Maplecroft	• Industry Risk Analytics	• Global Risk Dashboard (GRiD)
35	Verite	• CUMULUS Forced Labor Screen	• CUMULUS Forced Labor Screen • Responsible sourcing tool

Appendix 2: Profile of suppliers

Suppliers focussed on step 2 and step 3 of the due diligence cycle with few delivering tools related to other steps

Of the longlist of 43 suppliers, most provided tools and resources related to risk assessment, reporting, education and training, supply chain mapping, risk management, due diligence, and supplier engagement (Figure 8). Step 6 of the due diligence cycle (such as remedy and grievance mechanisms) was only provided by about a fifth of suppliers.

New Zealand businesses have had little engagement with suppliers so far

Given the infancy of modern slavery legislation in New Zealand (and in Australia), and the size of both markets, it is unsurprising that only 44% of suppliers had clients or customers in New Zealand, and 58% had clients or customers in Australia (Figure 9).

Figure 8. Suppliers tended to specialise in step 2 and step 3 of the due diligence cycle

Risk identification/assessment	98%, 42
Reporting	93%, 40
Education and training	91%, 39
Supply chain mapping	84%, 36
Risk management	84%, 36
Due diligence	79%, 34
Supplier engagement	79%, 34
Policies and procedures	44%, 19
Other	26%, 11
Worker voice	23%, 10
Grievance mechanisms	21%, 9

Source: MartinJenkins request for information

Figure 9. Less than half of suppliers had a footprint in the New Zealand market

Rest of the world	100%, 43
Australia	58%, 25
New Zealand	44%, 19
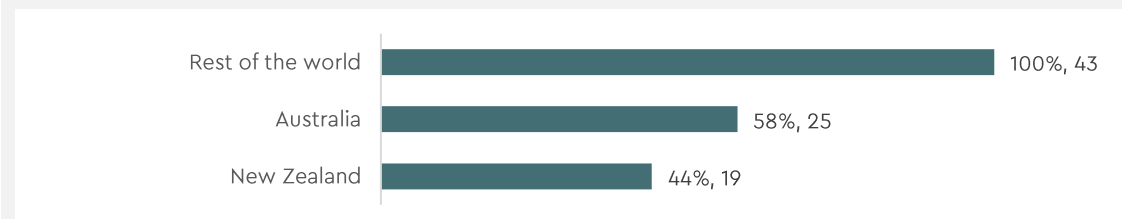
Source: MartinJenkins request for information

75% of suppliers had no specific sector focus, and manufacturing and retail were the most targeted sectors

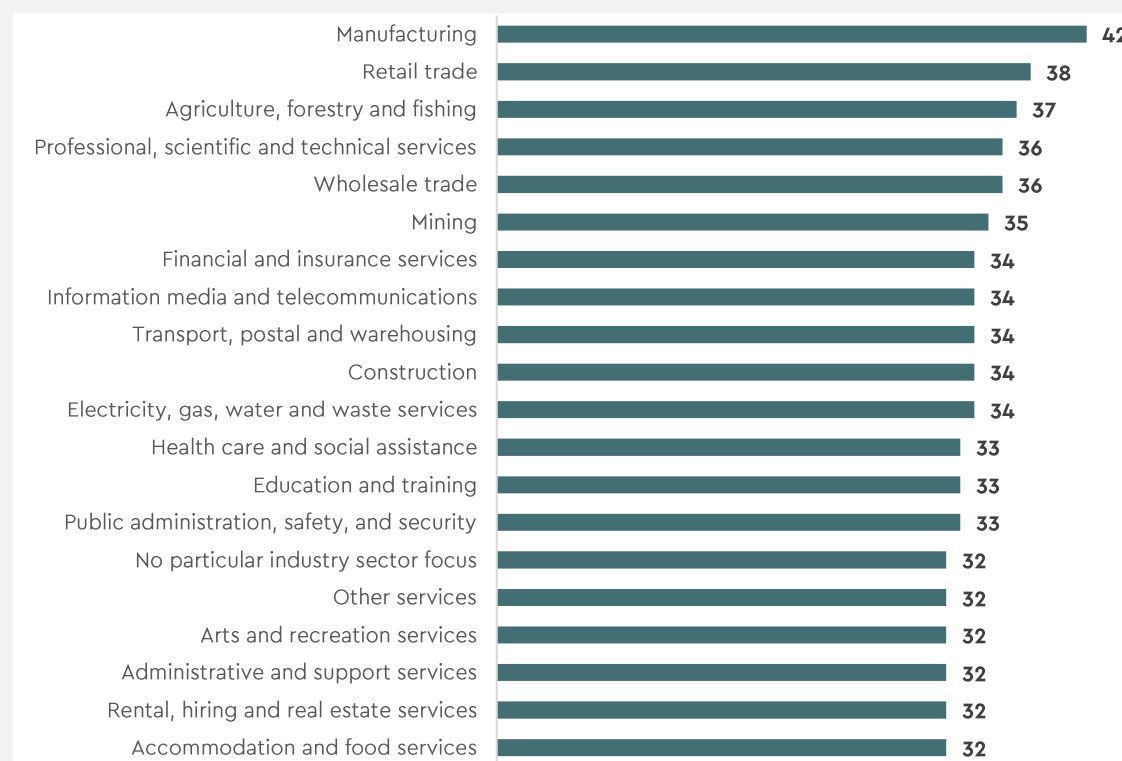Most suppliers (75%) did not specialise in specific sectors, but more targeted manufacturing, retail trade, and the primary industries – where the risks are greatest (Figure 10). This was contrary to the Employment New Zealand's initial view that some tools would be more suitable for some sectors than others.

All suppliers targeted large, multinational firms, consistent with legislative requirements

Only 15 suppliers provided information on the extent their clients or customers fell within particular revenue categories, but we are confident that they would be representative of the market. Unsurprisingly, all suppliers had clients with annual revenue of more than US$100 million (Figure 11). This is consistent with international legislative requirements that place duties on larger businesses whose supply chains are far reaching.
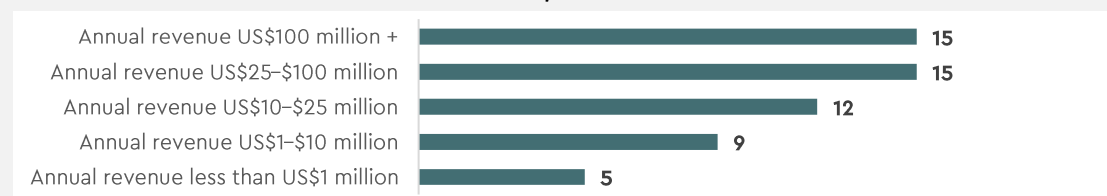
Only a third (5 suppliers) had clients with annual revenue of less than US$1 million.

Figure 10. Manufacturing and retail were the most focused on sectors

Sector	Value
Manufacturing	42
Retail trade	38
Agriculture, forestry and fishing	37
Professional, scientific and technical services	36
Wholesale trade	36
Mining	35
Financial and insurance services	34
Information media and telecommunications	34
Transport, postal and warehousing	34
Construction	34
Electricity, gas, water and waste services	34
Health care and social assistance	33
Education and training	33
Public administration, safety, and security	33
No particular industry sector focus	32
Other services	32
Arts and recreation services	32
Administrative and support services	32
Rental, hiring and real estate services	32
Accommodation and food services	32

Source: MartinJenkins request for information

Figure 11. All suppliers focused on the large, multinational businesses; a third had clients with revenue of less than US$1 million, *n* = 15

Category	Value
Annual revenue US$100 million +	15
Annual revenue US$25–$100 million	15
Annual revenue US$10–$25 million	12
Annual revenue US$1–$10 million	9
Annual revenue less than US$1 million	5

Source: MartinJenkins request for information

About MartinJenkins

This report has been prepared for Employment New Zealand, a part of the Ministry of Business, Innovation and Employment by EeMun Chen, with the support of MeiLin Harley, Ben Guernier, and Sharyn Jones from MartinJenkins (Martin, Jenkins & Associates Ltd).

For over 30 years MartinJenkins has been a trusted adviser to clients in the government, private, and non-profit sectors in Aotearoa New Zealand and internationally. Our services include organisational performance, employment relations, financial and economic analysis, economic development, research and evaluation, data analytics, engagement, and public policy and regulatory systems.

We are recognised as experts in the business of government. We have worked for a wide range of public-sector organisations from both central and local government, and we also advise business and non-profit clients on engaging with government.

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