



## Education New Zealand Briefing

**Title:** Education New Zealand's Quarterly Reports for December 2019 and March 2020

**Date:** 15 July 2020

**Priority:** Low

**Security level:** In Confidence

**ENZ ID no:** 1920-152

### Action sought

Addressee	Action sought	Deadline
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Minister of Education	<b>Note</b> the attached quarterly reports for December 2019 and March 2020.	
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**Agree** that this briefing will be proactively released as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be done so in line with the provisions of the Official Information Act 1982

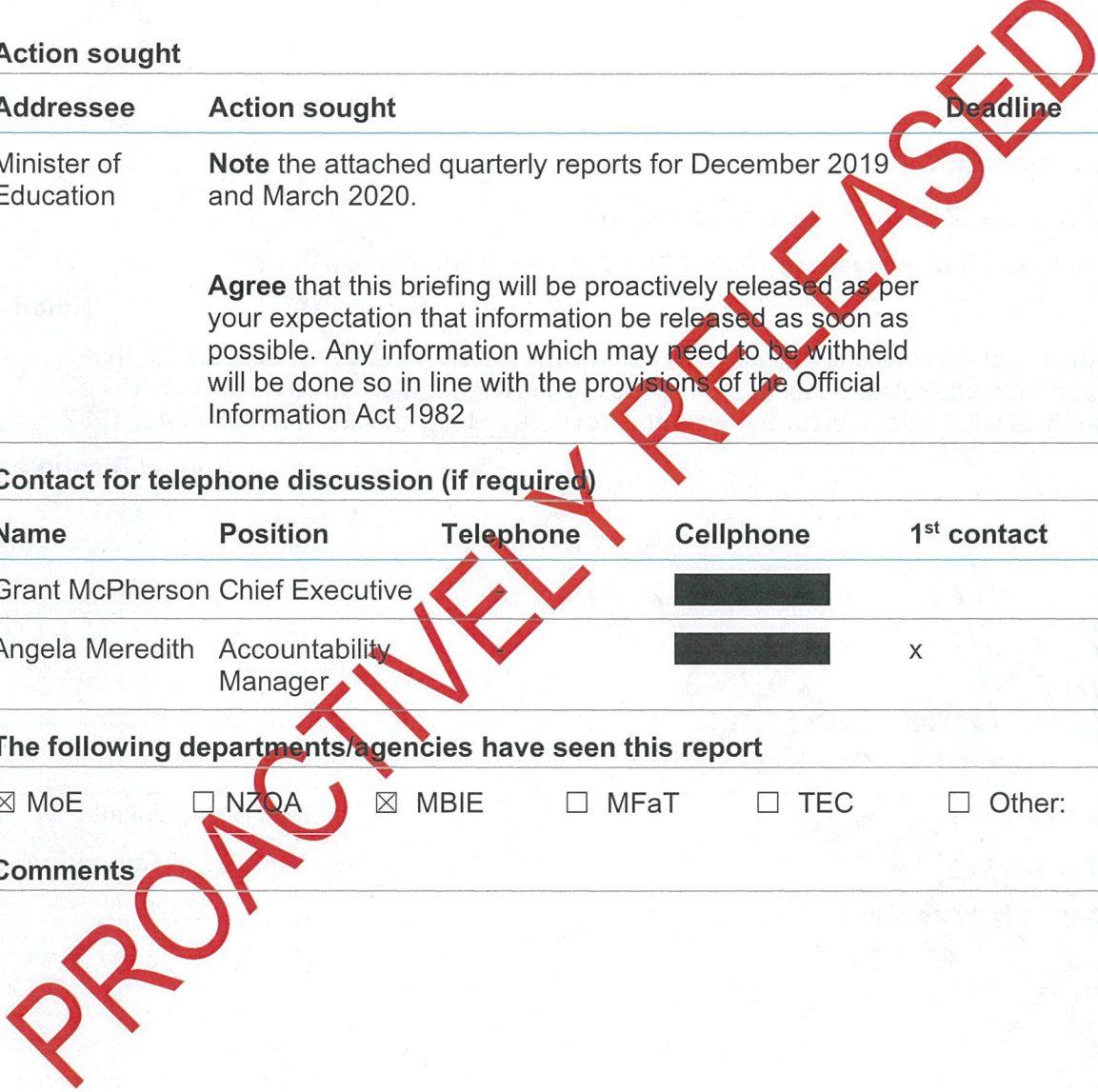
### Contact for telephone discussion (if required)

Name	Position	Telephone	Cellphone	1 <sup>st</sup> contact
Grant McPherson	Chief Executive		██████████	
Angela Meredith	Accountability Manager		██████████	x

### The following departments/agencies have seen this report

MoE    
  NZQA    
  MBIE    
  MFaT    
  TEC    
  Other:

### Comments



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### Recommendations

Education New Zealand recommends that you

a. **note** the attached quarterly reports for December 2019 and March 2020

**Noted**

b. **agree** that that this briefing will be proactively released as per your expectation that information be released as soon as possible. Any information which may need to be withheld will be done so in line with the provisions of the Official Information Act 1982

**Agree / Disagree**



Grant McPherson  
**Chief Executive**  
Education New Zealand

Hon Chris Hipkins  
**Minister of Education**  
\_\_\_/\_\_\_/2020

**PROACTIVELY RELEASED**

## Purpose

1. Education New Zealand's (ENZ's) quarterly reports for December 2019 (covering 1 October to 31 December 2019) and March 2020 (covering 1 January to 31 March 2020) are attached for your information.

## Background

2. The quarterly reports provide a progress report against the impact and performance measures included in ENZ's *Statement of Intent 2019-2023* and *Statement of Performance Expectations 2019-2020*.
3. The December 2019 report (Attachment 1) also reflects the pre-COVID-19 operating environment and reports progress under ENZ's four strategic priorities and ENZ's work to develop its capability to support those priorities.
4. Due to the early impact of COVID-19 on the international education sector, the March 2020 report (Attachment 2) summarises the start of ENZ's response to COVID-19 from when it first started to affect the China market and Prime Minister's Scholarship for Asia recipients who were in China at the time.
5. Due to the impact of COVID-19 on international education, ENZ will not be able to report the results for three measures in ENZ's Annual Report 2019/20. Audit New Zealand and ENZ's monitoring agencies (the Ministry of Education and Ministry of Business, Innovation and Employment) were informed of ENZ's decision and are comfortable with our decision.
6. ENZ's monitoring agencies reviewed the two quarterly reports.

### Measures that will not be reported in the Annual Report 2019/20

7. The three measures that will not be reported are:
  - 7.1. Percentage of facilitated customers that agree ENZ's services and support have added value to their organisation
  - 7.2. Percentage of users satisfied with the information and intelligence provided by ENZ
  - 7.3. New Zealanders value the social and cultural benefits that international education brings

*Percentage of facilitated customers that agree ENZ's services and support have added value to their organisation*

Performance measure	Actual 2017/18	Target 2018/19	Target 2019/20
Percentage of facilitated customers that agree ENZ's services and support have added value to their organisation.	71%	≥75%	≥75%

8. Due to the impact of the COVID-19 pandemic on the New Zealand international education sector and the joint communications approach taken by agencies in response

to the pandemic, ENZ decided that it would be inappropriate to run its annual Industry Survey. This survey asks international education providers, their peak bodies and regional economic development agencies whether ENZ's services and support have added value to their organisation.

*Percentage of users satisfied with the information and intelligence provided by ENZ*

Performance measure	Actual 2017/18	Target 2018/19	Target 2019/20
Percentage of users satisfied with the information and intelligence provided by ENZ.	87% of users rated it as good or higher	Overall rating = agree or higher	≥87%

9. As education providers also make up around 80% of the users of IntelliLab<sup>1</sup>, ENZ decided that would be inappropriate to undertake the survey for this measure. Only surveying the other users of IntelliLab would not be appropriate as government agencies have been focused on immediate responses to the COVID-19 crisis, which has largely had a domestic focus rather than a focus on international education.

*New Zealanders value the social and cultural benefits that international education brings*

Indicator of success	Actual 2017/18	Target 2019/20
Awareness of the contribution of international education to New Zealand	63%	Increase

10. ENZ decided that it would be inappropriate to survey New Zealanders about their perceptions of international education at this time. ENZ developed a strategic recovery plan to help the international education to transform and sustainably following the COVID-19 pandemic. Cabinet has agreed that the proposed recovery plan be consulted on. If ENZ was to run the survey, it would be in the field at the same time as ENZ is leading the consultation on the recovery plan.

<sup>1</sup> IntelliLab is ENZ's online intelligence portal. Users include education providers, New Zealand government agencies (including local government agencies) and education peak bodies.

# Education New Zealand

Quarterly Report for 1 October to 31 December 2019

**THINK  
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## Executive summary

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This quarterly report covers the period 1 October – 31 December 2019<sup>1</sup>. This is the second quarterly report against Education New Zealand's (ENZ's) *Statement of Intent 2019-2023* and *Statement of Performance Expectations 2019/20*.

During the quarter, one focus of ENZ's activities was to deliver continued support for New Zealand's vocational education. Relationships continued to be developed with the people involved in the establishment of the New Zealand Institute of Skills and Technology and ENZ's contributing an international education perspective to several streams of this work. ENZ also led promotional activity in China with institutes of technology and polytechnics and a wananga, including presenting at a dedicated New Zealand-China session at the largest international education conference and expo in China.

ENZ continued to engage with Immigration New Zealand (INZ) on the joint work programme. ENZ sought INZ's perspective on plans for ENZ's priority markets and the agencies agreed on an India promotional strategy and a Viet Nam market development strategy for 2020.

A six-week global digital campaign was run to increase awareness of New Zealand as a high-quality study destination, highlighting New Zealand's innovative new thinking and values of societal openness, transparency and manaakitanga. The campaign used ENZ's digital and social media channels to show unscripted videos of students, teachers and parents providing answers to questions likely to be asked by prospective international students. New Zealand providers and ENZ Recognised Agencies were encouraged to share the content and align their messaging with the campaign.

ENZ worked with other New Zealand government agencies and New Zealand education providers to ensure that Prime Minister's Scholarship for Asia and Prime Minister's Scholarship for Latin America recipients were provided with advice and their wellbeing was monitored while protests were underway in Chile, Colombia and Hong Kong.

The next quarterly report will include information ENZ's response to COVID-19. This is expected to have a significant impact on ENZ's performance measures for the second half of 2019/20.

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<sup>1</sup> This report includes calendar year and financial year information. A calendar year is shown as a single year, such as 2019, while dates such as 2019/20 refer to a financial year.



## Impact measures

	Target 2019/20	2018/19 Full Year Result	2019/20 YTD result	On track <sup>2</sup>	Comment
International student perceptions of education quality.	2020: 8.2 out of 10	2018/19: 8.0 out of 10		●	The result will be reported in Q4.
The percentage of international students who were satisfied or very satisfied with their overall experience.	2019: Establish new baseline	New baseline in 2019/20	88%	✓	New baseline has been established.
The economic value from New Zealand's international education sector.	2019: \$5.1 billion	2018: 4.94b		●	The result will be reported in Q4.
The economic value per international student.	2019: Increase	2018: \$39,000		●	The result will be reported in Q4.
The percentage of international students enrolled to study outside Auckland.	2019: Increase	2018: 44%		●	The result will be reported in Q4.
The percentage of the international education sector's economic value coming from New Zealand's top two markets.	2019: Decrease	2018: 45.5% of economic value		●	The result will be reported in Q4.
Awareness of the contribution of international education to New Zealand.	2019/20: Increase	2018/19: 58%		●	The result will be reported in Q4.

**Key:** ✓ on track to achieve full year target

x not met

● not measured, or not currently on track to achieve full year target



## Performance measures

	2019/20 Target	2018/19 Full Year Result	2019/20 YTD result	On track <sup>3</sup>	Comment
Percentage of facilitated customers that agree ENZ's services and support have added value to their organisation.	≥ 75%	93%		●	The result will be reported in Q4.
Percentage of Active Visits on ENZ's studyinnewzealand.govt.nz website.	≥ 75%	77%	73%	●	
Number of registrations to ENZ's Student Membership Programme through studyinnewzealand.govt.nz website.	80-100,000	New measure in 2019/20	60,132		
Number of registrations to NauMai NZ	Establish baseline	New measure in 2019/20	2,110	✓	
Number of key messages about the benefits to New Zealand from international education delivered by third parties.	≥ 180	156	52	●	The target is unlikely to be met as the scope of the communications strategy has been broadened to include key internal and external projects e.g. NZIST transition and implementation, pastoral care, and ENZ's transformation plan.
Percentage of users satisfied with the information and intelligence provided by ENZ.	≥ 87%	78% of industry users rated ENZ's information and intelligence as 'good' or higher	56%	●	The result will be reported in Q4.
Percentage of Prime Minister's Scholarship recipients who report making five or more professional/business connections during their time on scholarship.	≥ 60%	56%	53%	●	51% of Prime Minister's Scholarship for Latin America (PMSLA) recipients and 53% of Prime Minister's Scholarship for Asia (PMSA) recipients reported making five or more professional/business connections.
Percentage of Prime Minister's Scholarship recipients who report making five or more academic connections during their time on scholarship.	≥ 60%	52%	57%	●	56% of PMSLA recipients and 57% of PMSA recipients reported making five or more academic connections.

**Key:** ✓ on track to achieve full year target

✗ not met

● not measured, or not currently on track to achieve full year target



**Activity indicator**

	2019/20 Activity standard	2018/19 Full Year Result	2019/20 YTD result	On track <sup>4</sup>	Comment
Number of New Zealand International Doctoral Research Scholarships funded.	10-20	27	20	✓	

**Organisational capability**

	2019/20 Target	2018/19 Full Year Result	2019/20 YTD result	On track <sup>4</sup>	Comment
Employee engagement.	Increase	New baseline established		●	The result will be available in Q4.

**Key:** ✓ on track to achieve full year target

x not met

● not measured, or not currently on track to achieve full year target



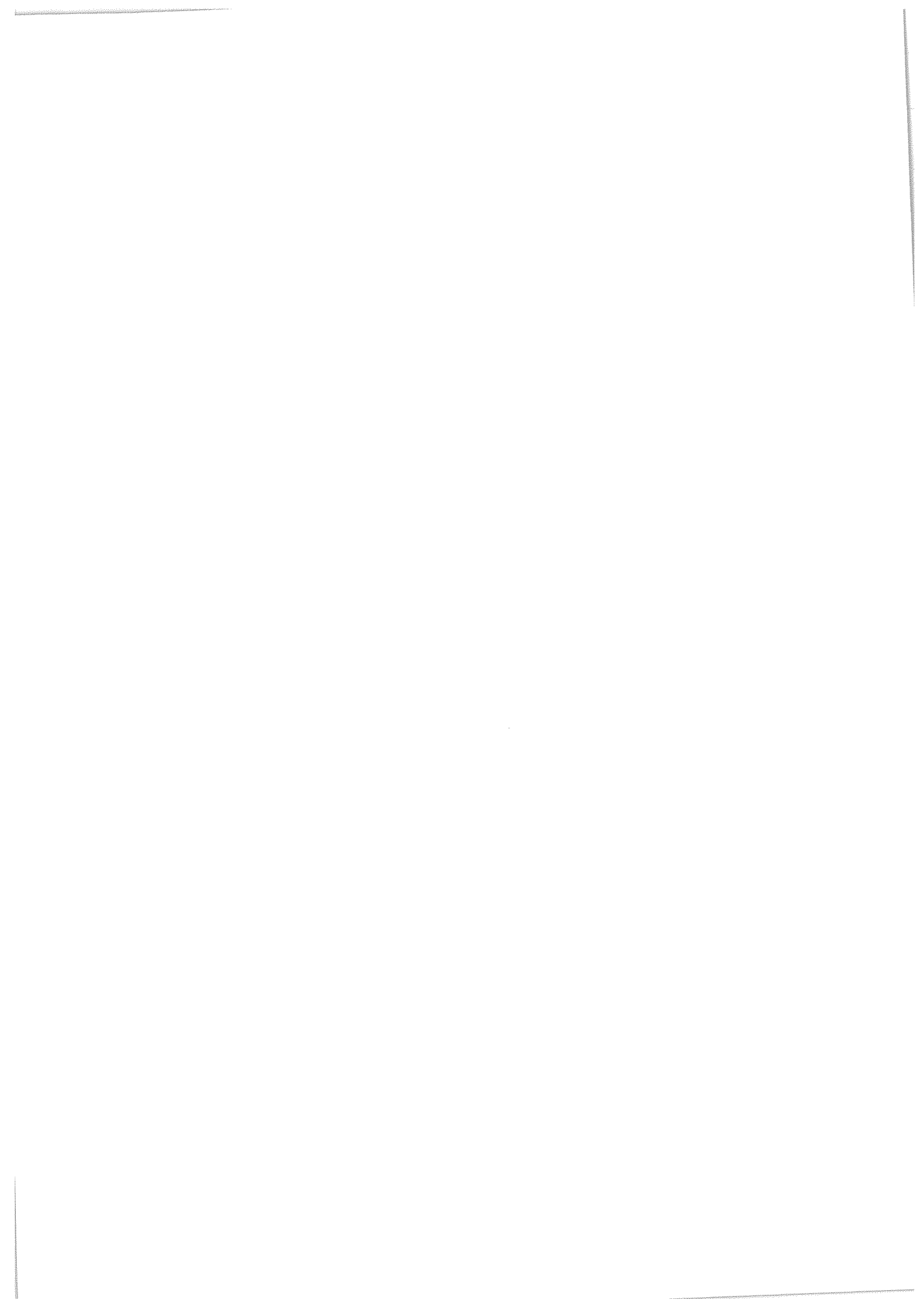


## Financial performance to 31 December 2019

STATEMENT OF FINANCIAL PERFORMANCE	As at 31 December		
	Actual 2019/20 YTD	Budget 2019/20	Actual 2018/19
<b>\$000s</b>			
<b>Operating Revenue</b>			
Revenue from the Crown - Operating	13,766	13,766	13,817
Revenue from the Crown - EEL	1,632	1,632	1,632
Other revenue	1,948	1,924	1,290
<b>Total operating revenue</b>	<b>17,346</b>	<b>17,322</b>	<b>16,739</b>
<b>Scholarship Revenue</b>			
Revenue from the Crown - scholarships	2,175	2,175	2,275
<b>Total scholarship revenue</b>	<b>2,175</b>	<b>2,175</b>	<b>2,275</b>
<b>Operating Expenditure</b>			
Personnel costs	6,875	6,928	5,998
Other expenses	10,411	10,655	9,438
Depreciation & amortisation expenses	213	137	185
<b>Total operating expenditure</b>	<b>17,499</b>	<b>17,720</b>	<b>15,621</b>
<b>Scholarship expenditure</b>			
Scholarship expenses	1,575	1,550	1,962
<b>Total scholarship expenditure</b>	<b>1,575</b>	<b>1,550</b>	<b>1,962</b>
<b>Net surplus</b>	<b>447</b>	<b>227</b>	<b>1,431</b>

STATEMENT OF FINANCIAL POSITION	As at 31 December		
	Actual 2019/20 YTD	Budget 2019/20	Actual 2018/19
<b>\$000s</b>			
<b>Assets</b>			
Total current assets	6,338	5,774	6,248
Total non-current assets	630	621	434
<b>Total assets</b>	<b>6,968</b>	<b>6,395</b>	<b>6,682</b>
<b>Liabilities</b>			
Total current liabilities	3,902	4,000	2,769
Total non-current liabilities	171	-	88
<b>Total liabilities</b>	<b>4,073</b>	<b>4,000</b>	<b>2,857</b>
<b>Net assets</b>	<b>2,895</b>	<b>2,395</b>	<b>3,825</b>

Scholarship revenue is received in equal instalments during the financial year whereas expenditure is mainly incurred across two application rounds, the first of which was held in October 2019.



## **Lead international education thinking**

### **New Zealand Institute of Skills and Technology**

ENZ continued to develop relationships with the marketing and international education work streams of the New Zealand Institute of Skills and Technology (NZIST). This included participating in naming and branding workshops, holding an induction session for the Acting Head of Marketing NZIST and the Principal Advisor for the international workstream and contributing an international education perspective to the Education Products & Services, Student Journey Map and Online Delivery Model workstreams.

ENZ started planning an interim international marketing campaign to help support the transition to a new approach to vocational education in New Zealand. At the same time, we started exploring the longer-term potential to work with the NZIST to tailor its student marketing approach to the new institution's goals to ensure it can attract the right international students, studying appropriate disciplines in the right regions.

ENZ seconded its Director Brand and Design to lead ENZ's work on the Reform of Vocational Education and regional development, with a particular focus on leading ENZ's involvement in the implementation of the NZIST. The staff member will lead the development of short-term marketing support for the vocational sector, while building the longer-term international marketing proposition.

### **Transformation plan**

The *International Education Strategy 2018-2030* commits New Zealand to building a sustainable international education sector with broad outcomes for New Zealand and for students at its centre. There is potential for international education to deliver even more due to shifts in the environment that have gained momentum since the strategy was developed. In response, ENZ has been developing a transformation plan.

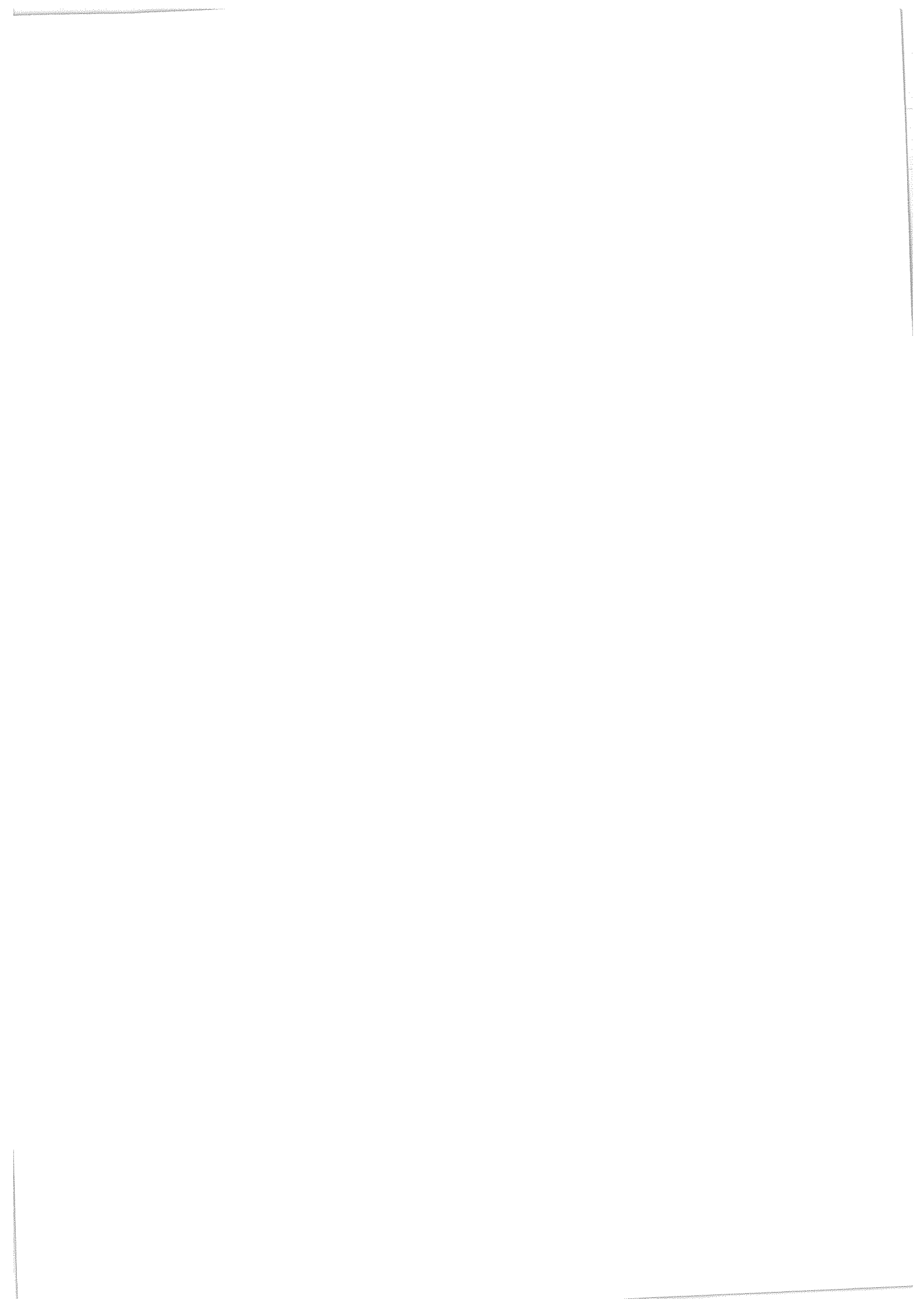
During the quarter, ENZ developed an initial feasibility study which focuses on:

- Exploring new modes of delivery including on-line, offshore and blended education
- Supporting Government goals including regional development and the Education Work Programme
- Ensuring international education acts as a catalyst to support wider New Zealand Government priorities

### **Joint work programme with Immigration New Zealand**

ENZ engaged with INZ while developing its Regional Activity Plans (RAPs) for January to June 2020. This engagement was to seek INZ's perspective on plans for ENZ's priority student attraction markets. This work supports the Joint Work Programme goal of aligning market strategies.

Following engagement around the RAPs, ENZ and INZ agreed a 2020 promotional strategy for India, taking into account geographic and INZ-sourced information within this market and focusing on the university sector. The two agencies also used a working group process to reach agreement on the Viet Nam market development strategy for 2020. This strategy will include continued promotion of New Zealand secondary schools, including a New Zealand schools scholarships initiative.



An *E-News* item for the sector on the INZ-ENZ Joint Work Programme was the highest-read of the 14 November 2019 issue. The item quoted INZ as saying it is in a good space to process the predicted volume of student visa applications expected in the current peak season. It also recommended student visa applications be lodged as early as possible and referenced the first-time student visa checklist, which was published in the previous quarter to help students submit decision-ready applications.

## **Promote an excellent education and student experience**

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### **Ask New Anything global campaign**

ENZ ran the its first global digital campaign for 2019/20 in ENZ's key markets<sup>5</sup> for eight weeks. The main objective of the campaign was to challenge perceptions of New Zealand by increasing awareness of the country as a high-quality study destination. It showcased New Zealand's innovative new thinking and captured New Zealand's values of societal openness, transparency and manaakitanga.

Utilising 100 short videos, a variety of digital media placements, Tohu the chatbot, a range of social media channels including a peer-to-peer Facebook group and Instagram Live sessions hosted by ENZ's Kiwi Ambassadors, the campaign embodied the refreshed Think New education brand. The short, unscripted videos used international and New Zealand students, alumni, a teacher, a parent, and a New Zealand employer to provide answers to the questions posed.

ENZ encouraged New Zealand providers and ENZ Recognised Agencies (ENZRA) to participate in the campaign by sharing content and aligning their messaging with those of the campaign and the Think New brand.

Because the audience in China uses different digital platforms to ENZ's other key markets, a bespoke strategy was used in China.

### **ENZ Recognised Agencies programme**

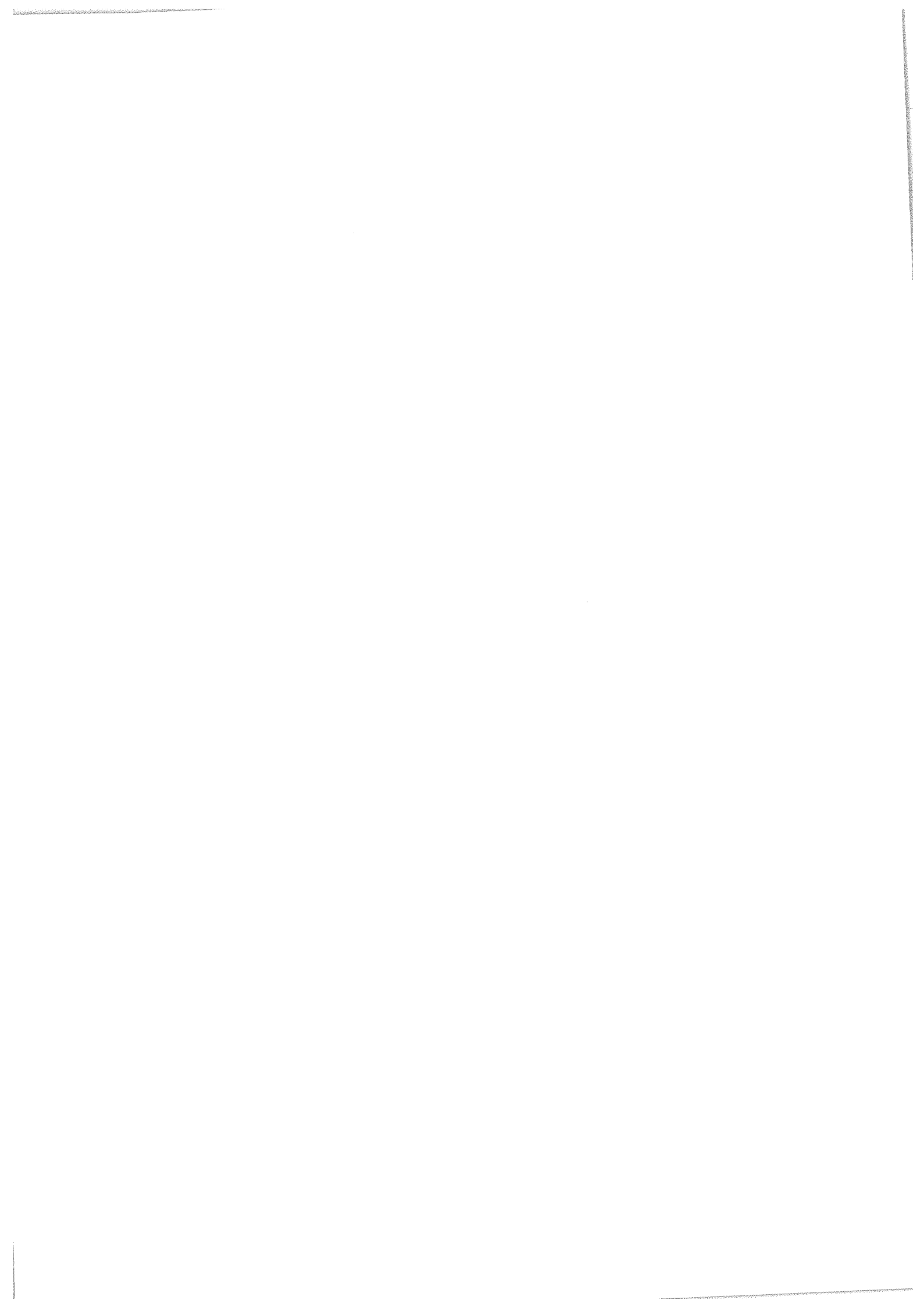
ENZ is dedicated to increasing engagement with quality education agencies that have demonstrated a long-term commitment to promoting New Zealand as an international study destination and are successfully placing students at New Zealand education providers. ENZ has now completed its first annual review period of the ENZRA programme since it was re-launched on 1 November 2018.

A total of 310 Recognised Agencies were selected globally to be part of the programme in 2019/20. Of the Recognised Agencies from 2018/19, 26 lost their ENZRA status and of the 65 applications received from agencies who wanted to enter the programme, 28 were approved for ENZRA Recognised Agency status.

ENZ has developed a webinar series for ENZRA Recognised Agencies and will continue to hold in-market ENZRA workshops.

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<sup>5</sup> The key markets were Brazil, Colombia, France, Germany, India, Indonesia, Italy, Japan, Korea, Philippines, Thailand, the United Kingdom, the United States of America and Viet Nam.



## **Grow sustainable international education**

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### **Regional development**

ENZ completed a round of funding for New Zealand's regions, with a primary focus on supporting capable regions and tertiary providers to develop regional talent pathways to facilitate the pipeline of international graduate talent into areas of regional skill shortage. The secondary focus was on supporting stronger secondary school to tertiary pathways to incentivise a cohesive regional approach to value retention and market/product development.

In line with this focus, the Central Regions<sup>6</sup>, Queenstown and Wellington were awarded co-funding to undertake talent pathways work and Christchurch, Dunedin and Wellington were awarded co-funding to progress secondary school to tertiary pathways.

### **Vocational education**

ENZ led a series of vocational education promotions in China. Manukau Institute of Technology, Otago Polytechnic, Southern Institute of Technology, Wellington Institute of Technology, Waikato Institute of Technology and Te Whare Wananga o Aotearoa participated in the annual Sino-New Zealand Model Vocational Programme Conference in Qingdao, in partnership with the Chinese Central Institute for Vocational and Technical Education in China.

ENZ presented at a dedicated New Zealand-China session within the 2019 International Forum on Vocational Education at the China Annual Conference for International Education (CACIE), the largest international education conference and expo in China.

### **Viet Nam**

Minister of Finance Grant Robertson witnessed the signing of a Collaboration Arrangement between ENZ and the Ha Noi Department of Education and Training during his visit to Viet Nam. Vietnamese Government support is critical for the effective promotion of New Zealand education in Viet Nam, and the Arrangement creates a platform to explore educational partnerships in the following areas:

- connection, exchanges and partnerships between schools in New Zealand and Ha Noi
- training and development for students through scholarships offered by New Zealand institutions
- professional development for teachers and education management officers in Ha Noi
- promotion of New Zealand education institutions to prospective students and their parents in Ha Noi

### **Europe**

ENZ supported a significant New Zealand presence at the annual European Association for International Education (EAIE) conference. The main annual international education conference in Europe, EAIE 2019 attracted 6,200 higher education professionals from 95 countries. New Zealand's pavilion, with refreshed 'I am New' branding, provided a platform for seven universities and two ITPs to hold meetings and build partnerships. ENZ hosted a New Zealand event for key education contacts, briefed the education providers on challenges and opportunities in the Europe market, and met with government, education agency and media contacts.

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<sup>6</sup> The Central Regions is made up of Taranaki, Whanganui and Manawatu.





## **United States of America**

ENZ and the United States Department of State's Bureau of Educational and Cultural Affairs (ECA) renewed the Education Cooperation Arrangement for the Benjamin A. Gilman International Scholarship Program<sup>7</sup>, which supports economically disadvantaged students from the US to study abroad. The Arrangement will continue for five years (2019-2023) with increased funding from ENZ of US\$50,000 per annum, which the ECA will match to increase the number of Gilman scholars in New Zealand. ENZ is focusing on indigenous student mobility, supporting efforts to diversify the US student cohort coming to New Zealand.

## **Develop global citizens**

### **Prime Minister's Scholarships**

During the quarter there were violent protests in Hong Kong, Chile and Colombia – three locations where recipients of the Prime Minister's Scholarship for Asia (PMSA) and the Prime Minister's Scholarship for Latin America (PMSLA) can undertake study or an internship.

ENZ provided advice to scholarship recipients who were in those locations, in line with the Ministry of Foreign Affairs and Trade's Safe Travel website. ENZ monitored the welfare of the scholarship recipients who were in those locations and offered the opportunity to return to New Zealand early. In addition, ENZ provided advice to scholarship recipients who were due to travel into areas where protests were underway, with recipients able to delay taking up their scholarship until a later date.

As travel insurance companies no longer issue the full insurance coverage for Hong Kong required for the PMSA, ENZ decided not to award scholarships for study or internship in Hong Kong for the first 2019/20 scholarship round, with successful recipients instead able to select a different destination.

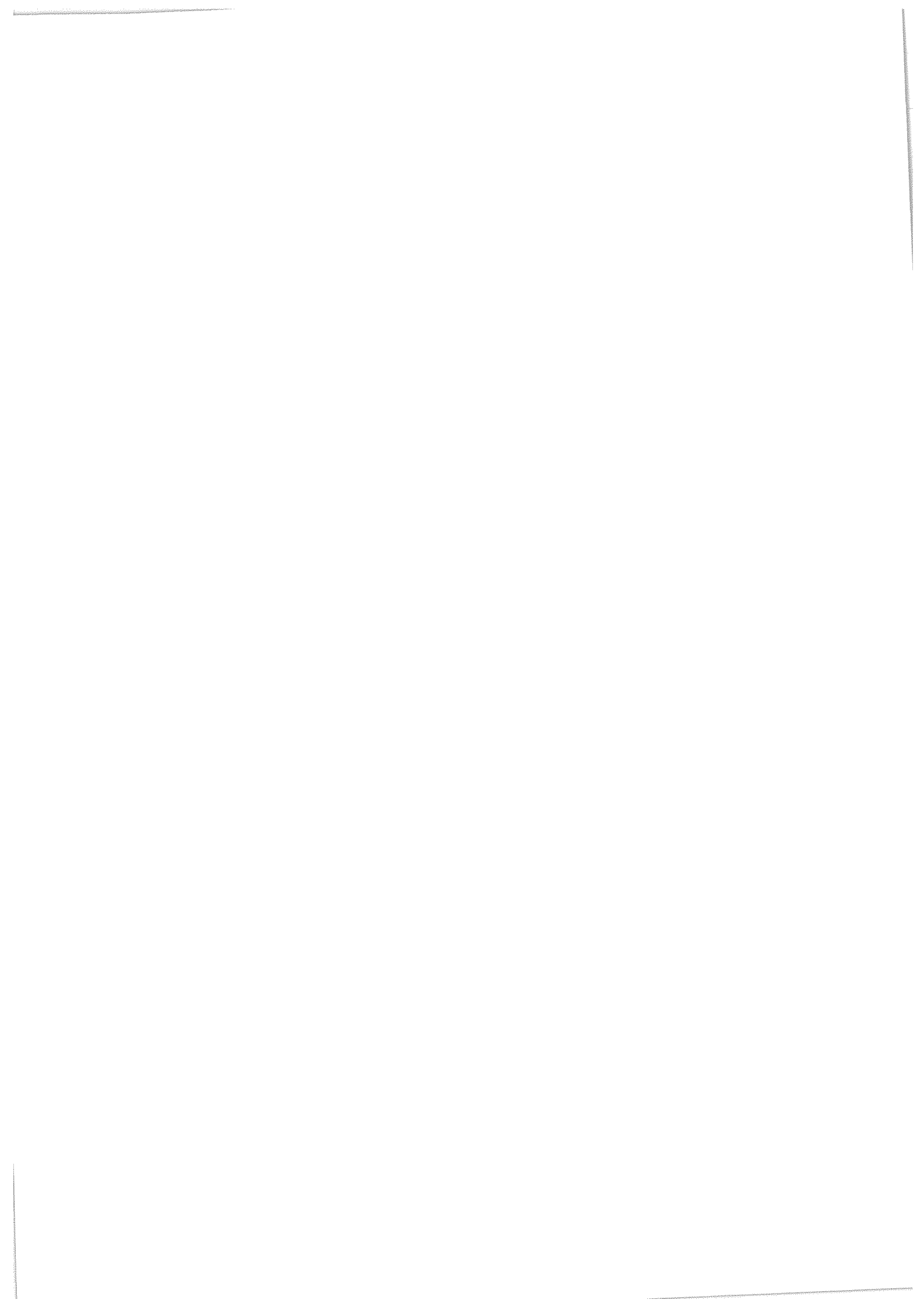
Selection panels for the first 2019/20 round of the PMSA and PMSLA were held in October. A total of 181 recipients (88 individual awards and 11 group awards made up of 93 individuals) were awarded a PMSA and 68 recipients (23 individual awards and 6 group awards made up of 45 individuals) were awarded a PMSLA.

### **Research links**

ENZ formed a partnership with São Paulo Research Foundation (FAPESP) to grow academic research and exchange between New Zealand and Brazil. ENZ and FAPESP will each provide \$100,000 to a minimum of eight established academic researchers across any field. The first year of the funding agreement will act as a pilot. Successful applicants from New Zealand will complete their projects in São Paulo and FAPESP will in turn send Brazilian researchers to New Zealand. This reciprocal academic mobility supports stronger international connections, research links and partnership.

ENZ supported a delegation of senior academics and researchers from all eight New Zealand universities to visit Colombia and Brazil. The delegates explored options to collaborate in new areas, such as pharmaceutical sciences, and build on previous historical collaboration in areas such as agri-business. In Colombia, the delegation was part of the official New Zealand presence at the CAIE 2019. In Brazil, they met with the Oswaldo Cruz Foundation, the most prominent health-focused science and technology institute in Latin America, and with academics from

<sup>7</sup> The initial agreement in 2017 was for two years at US\$25,000 per annum. New Zealand was the first foreign government to enter an arrangement with the United States Department of State around the Gilman program. In 2019, Wales and France announced partnerships to support the scholarship.



universities across the country. In both Colombia and Brazil, the delegation participated in 'Innovation and Education in New Zealand' seminars for undergraduate and postgraduate students interested in studying in New Zealand. These seminars were co-hosted by members of University New Zealand's Latin America Elite Agent programme.

## **Our organisational development**

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### **New corporate identity**

ENZ's new corporate brand, to align with the refreshed ThinkNew education brand, started to be rolled out. ENZ's Brand and Te Rautaki Māori teams worked together to ensure our ingoa Māori (Māori name) *Manapou ki te Ao* and the story behind it is central to the new corporate identity. ENZ's corporate website will be visually refreshed in early 2020 at minimal cost.

Part of the new corporate brand is a new colour palette which together tell the story of Manapou ki te Ao (deep water, light water, sand and manapou orange). We have created a visual design which is symbolic of the kākā carrying the manapou stone that sustained and nourished its flight to New Zealand.

Manapou ki te Ao is also a metaphor that ENZ uses to describe New Zealand education – nourishing and empowering, New Zealand education enables students to flourish and creates the world's next generation of problem solvers.

