

# Education New Zealand Manapou ki te Ao

Briefing to the Incoming Minister

November 2023

THINK  
NEW<sup>®</sup>



# INTERNATIONAL EDUCATION AT A GLANCE

*\$1.278 billion in direct contribution to GDP in 2022*

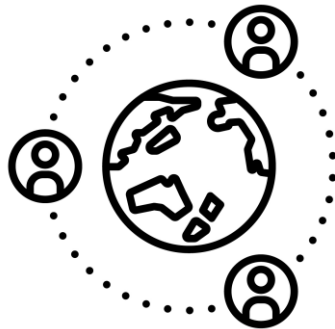


*41,360 international students enrolled with New Zealand education providers in 2022*

*Top 8 sources of international students in 2022*

- China: 20,050
- Germany: 450
- India: 3,985
- Japan: 1,765
- South Korea: 1,920
- Thailand: 950
- USA: 775
- Viet Nam: 1,585

*35.6% of New Zealand educational publishing revenue was earned from international education in 2022*

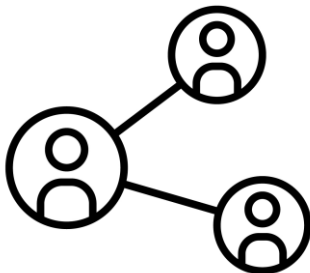


*Around 2% of New Zealand tertiary learners studied abroad in 2019*

*There is evidence that international education contributes to soft power in diplomacy, trade, and perceptions of New Zealand*



*74% of EdTech companies surveyed by EdTechNZ export their product or service*



*ENZ's offshore staff locations*



- Bangkok
- Beijing
- Berlin
- Guangzhou
- Ho Chi Minh City
- Jakarta
- New Delhi
- Santiago
- Sao Paulo
- Seoul
- Shanghai
- Singapore
- Tokyo
- Washington DC

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# INTRODUCTION

## International education delivers economic growth for New Zealand

International education is a national asset that supports the delivery of the government's goals for New Zealand and New Zealanders. It has been one of New Zealand's largest export sectors, it creates jobs and economic value, and it is integral to building enduring relationships between New Zealand and the rest of the world.

International education builds connections and helps to influence other countries to advance New Zealand's interests, project our values and secure the outcomes that matter to New Zealand, and for a better world.

International education has wider economic benefits, including through international students and their families spending on travel within New Zealand, accommodation, entertainment and undertaking tourist activities.

For New Zealanders, international education builds global skills and knowledge, exposes young people to new ideas and perspectives and helps build lifelong friendships.

International education was one of the sectors hardest hit by border closures as a result of COVID-19. While New Zealand's international education sector has successfully recovered from other setbacks such as the impacts of the Canterbury earthquakes and the 2008 global financial crisis, not only is competition stronger now globally but also how learners access education is changing.

There has been sound progress towards recovery since the borders opened in 2022, but education providers have not yet fully recovered, and volumes are not at pre-pandemic levels. International student enrolments for January to August 2023 are currently 51% of the full year 2019.

As with our competitor countries, New Zealand has traditionally attracted the majority of its international students from a small number of countries. In the future, diversifying source countries and education delivery modes will ensure that New Zealand is well positioned to continue to benefit from international education. It will also ensure that New Zealand delivers on students' evolving expectations for educational experiences.

Technology changes are also creating new opportunities for New Zealand companies and education providers. Education New Zealand is working to support expansion and growth in this area as well.

## Education New Zealand is focused on ensuring New Zealand benefits from international education

Education New Zealand Manapou ki te Ao (ENZ) is a crown agent operating under section 511 of the Education and Training Act 2020 to deliver on the government's priorities for international education.

Our name, Manapou ki te Ao, means nourishing and empowering, and represents how New Zealand education enables students to flourish – creating the problem solvers the world needs.

As the responsible Minister, you have responsibility for ENZ under both the Education and Training Act 2020 and the Crown Entities Act 2004.

ENZ's activities are focused on reviving international education by:



Attracting more **inbound students**



Supporting **sector capability** development



**Strengthening global connections** to grow international education



Supporting **diversification of the sector** to enable economic growth

To achieve this, we work with the international education sector as well as other government agencies both onshore and offshore. Our focus in the short term is to support the revival of the sector through the attraction of international students to New Zealand.

To this end, ENZ has prioritised our activities to attract students from China, Germany, India, Japan, South Korea, Thailand, the United States of America (USA) and Viet Nam. We have also been nurturing New

Zealand's education relationships in Brazil, Chile, Colombia, Indonesia, and Malaysia, as well as Europe and the Middle East.

Similar to our competitors, over the last decade, New Zealand has been over-reliant on a few key markets to attract international students. To achieve the long-term desired shift towards a diversified portfolio, ENZ has been addressing this through its market selection approach.

We look forward to working with you to achieve the government's plan for New Zealand and to deliver on your priorities for international education. We welcome a meeting to discuss this briefing and understand your priorities.

**Tracey Bridges**  
Board Chair

**Dr Linda Sissons**  
Acting Chief Executive

# OPPORTUNITIES AND CHALLENGES

We welcome an opportunity to discuss these further with you.

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## ***Globally the competition for international students has intensified***

- New Zealand's competitors are continuing to review and adapt to the changing environment
- Prompted awareness for New Zealand as an education destination has increased but preference has declined slightly – both are still low compared to most of our competitors
- Global and in-market promotional initiatives are complementary to the overall offering (including policy settings) in raising awareness and preference.

## ***The 2020-2022 border closure is still impacting New Zealand's international education sector***

- New Zealand's international education sector is recovering from a historically low number of international student enrolments, though recovery is uneven across education providers
- Education providers lost capability and capacity during the pandemic that they are rebuilding
- The sector wants to work more closely with government agencies to support the recovery – they would also like to see greater alignment across government agencies.

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## ***New Zealand has expertise that can meet growing global demand for offshore education products and services***

- Offshore demand for New Zealand education products and services delivered offshore is increasing because of factors such as jobs of the future that are changing significantly requiring different skills and aging population in New Zealand's international student attraction markets has meant that these governments are preferring to retain the young learners at home
- Other countries' national priorities are driving different skills needs to which New Zealand can respond to
- Education technology (EdTech) businesses are exploring niche areas in offshore markets
- Education publishers are building on their rich history and successful international reputation for excellence.

## ***ENZ is responding to support the revival of the sector, within budgetary constraints***

- ENZ recently launched a new campaign to increase awareness and preference for New Zealand as a study destination
- ENZ is working to support the sector's immediate capability needs to enable them to attract international students to New Zealand through the marketing assets available in our BrandLab
- ENZ is building and strengthening New Zealand's global connections to raise awareness of New Zealand education, improve New Zealand's education reputation and create the foundations for New Zealand's international education sector to operate in other countries.

# THE CURRENT INTERNATIONAL OPERATING ENVIRONMENT

International education is a globally competitive industry with the intensity of competition growing in recent years.

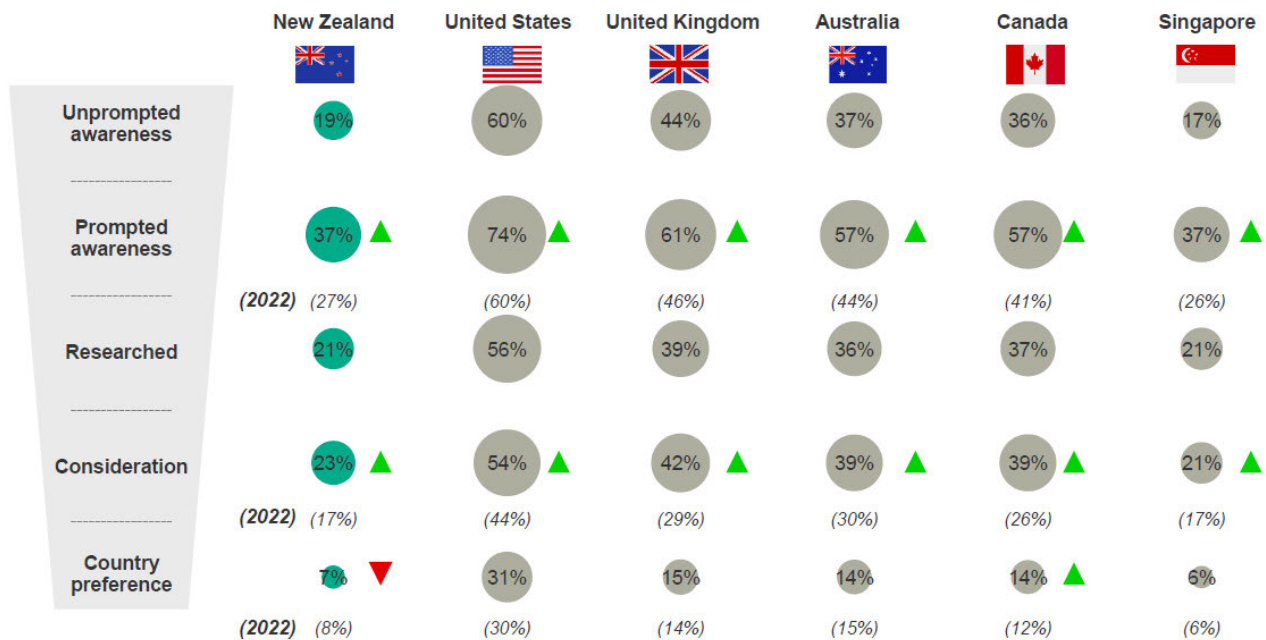
Global changes such as digital transformation, climate impacts, and aging populations in some markets and growing young populations in others, highlight that new skills and competencies will be required for the future of work.<sup>1</sup> The rise of lifelong learning, re-skilling and hybrid education delivery offers opportunities for international education. However, this also means that New Zealand is now facing competition not only from other countries, but also from corporations that are attracting a significant number of high-value international students to their education programmes.

## Student attraction

Demand for overseas study has been strong and continues to grow, but the shape of international student mobility is different to what it was before the pandemic. Many students are considering a greater range of destinations and a mix of how and when they want their education delivered.

The decision of where and with whom to study rests with prospective international students. Typically, prospective international students first select the country to study in based on their awareness and preference for a study destination using a range of factors (including many that are influenced by policy settings). As a result, driving student awareness and preference needs to continue to be a key focus for New Zealand.

Brand funnel by competitor<sup>2</sup>



<sup>1</sup> [How artificial intelligence could impact the workforce and the global economy](#). W.P. Live, The Washington Post, 2023.

<sup>2</sup> [Understanding the New Zealand education brand in key markets: brand tracker](#), Kantar (2023). This is an annual survey of 3,600, 16-25 years old who were

interested in studying overseas across 10 markets. In each market, 20% of students surveyed were aged 16-17 years old and 80% were 18-25 years old.

New Zealand continues to be attractive to prospective international students who wish to travel overseas for study. Like our competitor countries, prompted awareness of New Zealand has grown. While preference for study in New Zealand has declined slightly compared to 2022, more prospective students are including New Zealand as one of their top three preferred study destinations<sup>3</sup>. This means that prospective students who like New Zealand's international education offering, highly rank what New Zealand has to offer. The opportunity is to grow the number of prospective international students who like what New Zealand has to offer.

## New Zealand's competitors

Traditionally, New Zealand's key competitors for globally mobile students have been Australia, Canada, the United Kingdom (UK) and the USA. Singapore is an emerging competitor with growing awareness and market share. These countries are competing for the same pool of prospective international students who want to study in an English-speaking destination.

Overall New Zealand's competitors have recovered or exceeded their pre-pandemic international student enrolments. Most of their recovery has disproportionately occurred in the higher education subsectors.

To recover, these countries used multi-pronged approaches to attract students with a mix of initiatives, increased investment and policy settings reflecting their government's broader objectives, including post-study work rights tied to skills shortages. Scholarships, government subsidised tuition fees, bilateral education agreements and qualification recognition agreements were used to build awareness and preference.

Each of New Zealand's competitors has a clear and cohesive overall offering that reflects the global operating environment and their government's broader objectives and priorities. New Zealand's international education providers have consistently highlighted their desire for stronger alignment between government agencies, and for government agencies to work with the sector to deliver on the government's objectives.

According to the Ministry of Business, Innovation and Employment (MBIE), information from Migration 5 partners<sup>4</sup> is that their student visa programmes have seen substantial growth, accompanied with increasing levels of fraud and non-genuine students being identified. As a result, it is too early to tell whether their recoveries will be sustained over the long term. Also, some countries continue to make changes to their policy settings to achieve objectives broader than international education, such as the UK seeking to reduce overall migration numbers by reducing the eligibility of many international students to be accompanied by their partners and children.

ENZ looks forward to working alongside our government agency partners as part of a coordinated response to deliver on the new incoming Government's priorities.

## Market share

Asia is home to 60% of the global population, with China and India together being home to more than one third of the world's population.<sup>5</sup> Asia continues to be the main source region for globally mobile students, with most (57%) international tertiary students studying in the OECD and its partner countries coming from Asia.

<sup>3</sup> *Understanding the New Zealand education brand in key markets: brand tracker*, Kantar (2023).

<sup>4</sup> Migration 5 is made up of the immigration authorities of Australia, Canada, New Zealand, the UK and the USA.

<sup>5</sup> [UN DESA Policy Brief No. 153: India overtakes China as the world's most populous country](#), United Nations (24 April 2023).



According to the OECD, more than 60% of international tertiary students in Australia, Canada, New Zealand, the UK and the USA came from Asia.<sup>6</sup> This is driven by Asia's large and generally younger population and a desire for English medium education.

Similar to our competitors, while some Asian markets will continue to feature strongly in international education mobility, it is important to diversify where New Zealand attracts international students from. ENZ is addressing this over-reliance through its

market selection and diversification model. This will be a medium to long term solution as it takes time to build awareness and preference in new markets. To diversify, education providers need to be confident that the expected return on their time and investment will outweigh the risks posed. While government does not direct individual education providers, it can guide and support diversification. This is where ENZ can assist by developing connections in emerging markets that international education providers can then build on.

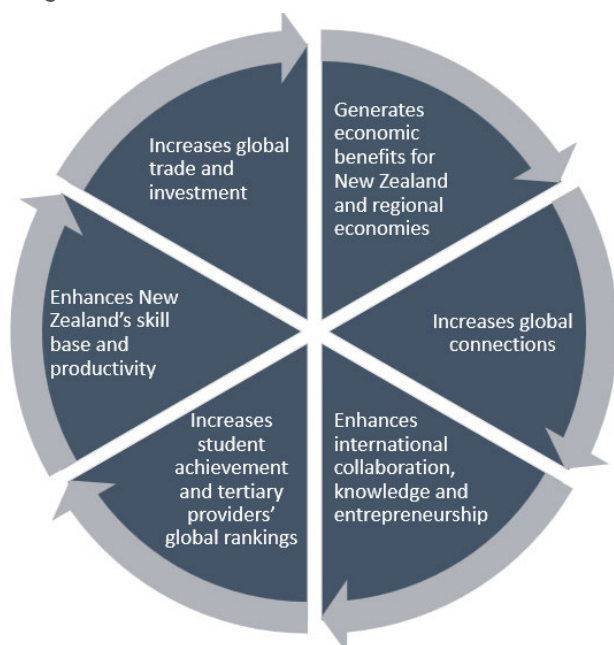
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<sup>6</sup> [Education at a Glance 2023](#), OECD (2023).

# THE BENEFITS OF INTERNATIONAL EDUCATION

International education is a large and significant export sector that benefits New Zealand economically, socially and culturally, and strengthens New Zealand’s connections with the rest of the world. It creates global citizens, generates jobs in New Zealand, and supports the labour market while enhancing New Zealand’s bilateral and multilateral relationships.

Diagram of the benefits of international education



Leveraging the nexus between immigration, economic and regional development, and international education portfolios presents a

further opportunity to enhance the contribution to the Incoming Government’s broader priorities.

International education is an important contributor to Gross Domestic Product (GDP). In 2022, \$1.278 billion in direct contribution to the economy came from tuition fees and expenditure by international students, expenditure by visiting family and friends, and education and training exports<sup>7</sup>. The sector’s recovery will significantly increase its GDP contribution in the coming years as the sector delivered \$3.7 billion in direct contribution to the economy in 2019<sup>8</sup>.

The international students who lived and worked in New Zealand after their study contributed up to an additional \$6 billion in the form of labour supply and productivity to GDP in both 2019 and 2022. This is over and above the direct financial contribution during their study<sup>9</sup>.

Most international students (62%) return to their country of origin immediately after they have completed their studies. A further 13% return home after undertaking post-study work, meaning that in total 75% have returned home within three years<sup>10</sup>.

Relationships created through international education support New Zealand’s relationships with key trading partners and help develop opportunities for growth in many other sectors. For example, the Korea-New Zealand Free Trade Agreement (signed in

<sup>7</sup> *Broader Benefits of International Education for New Zealanders – Baseline Valuation*, Ernst and Young (2022) used a forecast of 24,410 international students in 2022 to estimate \$0.76 billion in direct contribution to GDP in 2022. The actual student numbers have since become available with 41,360 international students in 2022. As a result, ENZ updated the model by subsector with actual student numbers for 2022.

<sup>8</sup> *Broader Benefits of International Education for New Zealanders – Baseline Valuation*, Ernst and Young, (2022).

<sup>9</sup> *Broader Benefits of International Education for New Zealanders – Baseline Valuation*, Ernst and Young, (2022). Modelling and Statistics New Zealand’s Integrated Data Infrastructure were used to estimate the GDP output and wage impacts associated with domestically trained international students who remained in New Zealand and transitioned into the domestic workforce in the 10 years leading up to 2019.

<sup>10</sup> *Broader Benefits of International Education for New Zealanders – Baseline Valuation*, Ernst and Young, (2022).

2015) allowed for more cooperation in education and two of the three education initiatives related to agriculture, forestry and fisheries. A positive impact from international

education comes from the links between international education, migration, trade and bilateral relations.

# SECTOR OVERVIEW

International education is made up of international students, education providers, 100+ businesses delivering education products and services offshore, onshore and offshore education agents, local economic development agencies and government agencies.

Sector peak bodies exist to provide representation to the various types of education providers and student associations represent international students.

At 30 September 2023, there were 921 education providers who are signatories to the Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021. They are:

- 16 NZIST/Te Pūkenga
- 156 private training establishments (PTEs) including English language schools
- 740 schools/kura
- 8 universities
- 1 wānanga

## Student attraction

Student mobility has been rebuilding since August 2022 (when the border reopened) with New Zealanders starting to study overseas and international students coming here for study.

Interest in New Zealand's education offerings remains high with international student enrolments from January to August 2023 exceeding enrolments for both the 2021 and 2022 calendar years.

From January to August 2023, there were 59,053 international student enrolments, with:

- 12% enrolled at English language schools
- 9% at PTEs
- 21% at schools
- 11% at NZIST/Te Pūkenga
- 47% at universities<sup>11</sup>

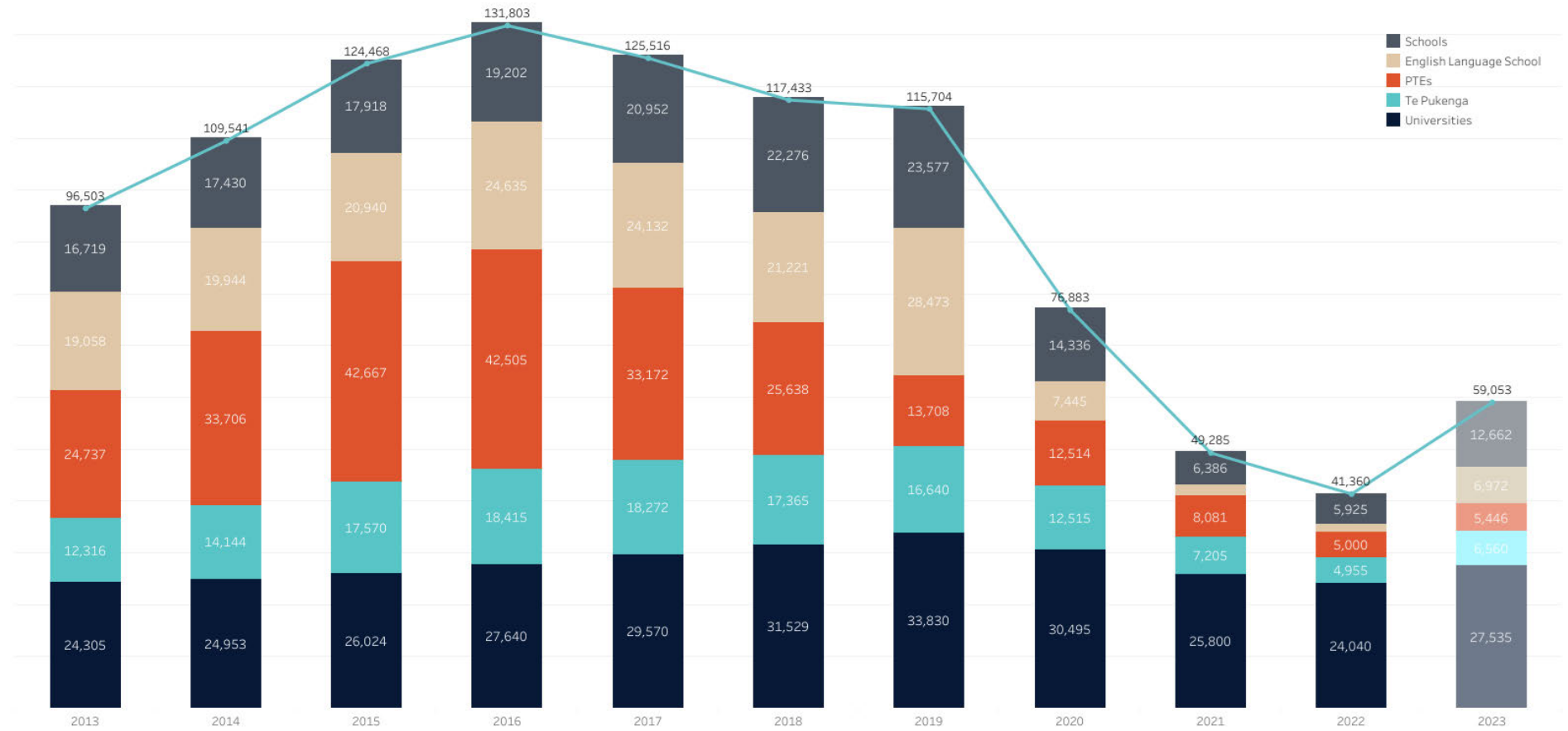
International student numbers have continued to grow during 2023, but they still have not fully recovered to pre-pandemic levels. From April to October 2023, there has been 20% increase in valid student visas. International student enrolments for January to August 2023 are currently 51% of the full year 2019.

Additionally, the pace of recovery has varied between education providers with international student enrolments at universities having increased faster than other parts of the sector.

Further growth in international student numbers is anticipated in 2024. Anecdotally ENZ understands that more prospective international students are now applying for student visas for multiple countries than was occurring pre-pandemic. This complicates our ability to predict what proportion of students granted a visa will ultimately choose to study in New Zealand.

<sup>11</sup> August 2023 Single Data Return and Term Two schools and Unfunded International Providers data, Ministry of Education, 2023.

Number of international students enrolled with New Zealand education providers (2013-2022 full year and January-August 2023)<sup>12</sup>



<sup>12</sup> August 2023 Single Data Return and Term Two schools and Unfunded International Providers data, Ministry of Education, 2023.

## Education products and services delivered offshore

New Zealand businesses delivering education products and services offshore, such as EdTech and education publishing are part of the international education sector.

This subsector operates across all levels of study from early childhood education and schooling to PhD academic research, lifelong learning and education research. This subsector has continued to grow over the past few years, influenced by issues such as:

- equity of access to, and the affordability of, higher education
- return on investment for the learner
- environmental concerns such as flight shame
- the emergence of life-long learning and the “learner-earner” segment (those who must juggle work and family responsibilities with study).

The pandemic accelerated these pre-existing shifts. Moreover, preference for online learning has endured beyond the re-opening of borders and has continued to grow at pace.

New Zealand education providers can also operate offshore through activities such as an offshore campus, joint programmes and the delivery of online learning to students based offshore. For example, Massey University has been teaching in Singapore since 2008 and recently signed a joint venture (via Massey Global Ltd in Singapore) with an education investor with facilities in Singapore.<sup>13</sup>

Global skills demands, new technologies, global challenges and evolving learners’ needs will continue to reshape international education. Growing demand for lifelong learning, career advancement/professional development, and ‘fit for purpose’ learning experiences are important opportunities for the sector. More recently, we have observed

non-traditional entrants in the global education space which evidences the demand from learners and expectation of employers for their people to continually learn and upgrade their skills to ensure workforce relevance, for example Salesforce and Google.

### *Education technology*

New Zealand EdTech businesses are an integral part of international education. They support and inform the way education is consumed around the world and work to meet changing learner needs. Some examples of EdTech are:

- delivering digital classroom resources and to help engage children with their learning and teaching digital skills, (for example, Banquer)
- delivering English language education using technology and television drama series with teaching and learning resources (for example, Chasing Time English)
- delivering classroom management systems and software as a service to schools (for example, Education Perfect and Kami).

EdTech businesses have substantial opportunities for international growth by leveraging economies of scale. They cultivate core digital capabilities that enhance learning outcomes, build future work skills, streamline operations and optimise processes.

A recent survey showed that 74% of New Zealand’s EdTech businesses export offshore. Their top five offshore markets are Australia (18%), the USA (14%), the UK (13%), China (6%) and Canada (4%).<sup>14</sup>

New Zealand EdTech businesses are setting their sights on global markets, for example primary education in Australia.<sup>14</sup> There are also opportunities from leveraging

<sup>13</sup> [New partnership will lead to an increased Massey presence in Singapore](#), Massey University (9 August 2023).

<sup>14</sup> *EdTechNZ Annual Survey: Key findings and results – 2023*, EdTechNZ (2023).

technology, such as AI, in language learning and tutoring.

### ***Education publishing***

They provide literacy materials and resources to Australia, China, the UK, the USA and others. Some also develop education content for major multinational publishers. Education publishers are adapting to digital formats, sometimes working in partnership with other

international education businesses, particularly those in EdTech.

Education publishers have a rich history and successful international reputation for exporting 'excellence' in education publishing. They have reached learners and educators in established markets spanning 60 countries, in some cases for more than 40 years. Wendy Pye Publishing's Sunshine Books has provided resources to teach reading for more than 35 years.<sup>15</sup>

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<sup>15</sup> <https://publishers.org.nz/members/wendy-pye-publishing/>

# AGENCIES INVOLVED IN INTERNATIONAL EDUCATION

New Zealand’s policy environment for international education is complex. Policy and regulatory settings affect international students, New Zealand students looking to undertake an international education experience, and international education providers and businesses. An aligned and coordinated approach across key government agencies is important to deliver the best overall benefits for New Zealand.

As the Government’s lead advisor on the education system, the Ministry of Education (MoE) shapes the direction for education agencies and providers, including for international education. MoE also administers the Export Education Levy<sup>16</sup> and works with other NZ Inc agencies to support international connections of significance to the education system.

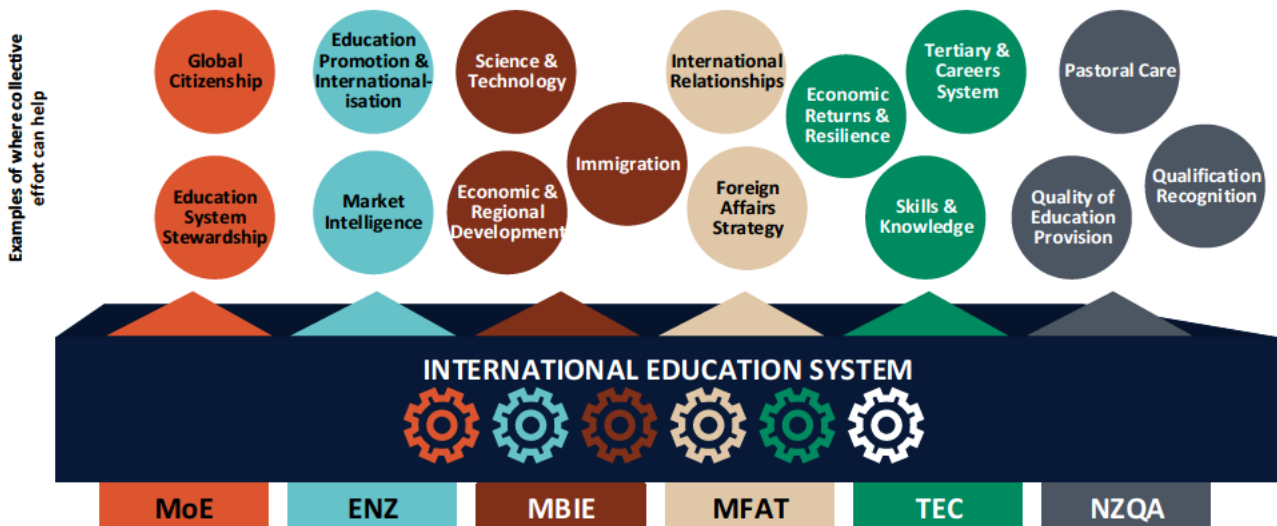
MoE is responsible for developing the pastoral care standards for international students. The New Zealand Qualifications Authority (NZQA) administers the Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021 which

supports the wellbeing of tertiary and international learners enrolled with education providers. It sets out the requirements that education providers must meet for the wellbeing and safety of their learners.

NZQA also contributes to international education through ensuring the quality of New Zealand qualifications and quality assuring tertiary education providers (except universities). This provides assurance that New Zealand’s qualifications are valued and credible here and abroad. NZQA supports qualifications recognition as part of New Zealand’s treaty obligations under UNESCO conventions and bilateral and multilateral free trade agreements.

MBIE also has policy responsibility for critical areas that affect international education including immigration settings and the labour market. International education provides opportunities to help address the nation’s skill shortages.

ENZ’s role is explained in more detail in the following section of this briefing. We will



<sup>16</sup> The Export Education Levy is collected from education providers that enrol international students. It helps fund a broad range of activities and projects relating to the international education industry, including promotion and marketing of New Zealand,

quality assurance of courses, and reimbursements for international students caught out by programme and provider closures.



continue to work with the policy agencies on the government's priorities to revive international education.

Immigration New Zealand (INZ) is a key agency partner for ENZ. INZ makes decisions about who can be granted a visa to enter the country and study here.

There are other agencies with a stake in international education including the Ministry of Foreign Affairs and Trade (MFAT). Education is a valuable tool for building diplomacy networks and bilateral trade outcomes for New Zealand. ENZ's offshore Regional Directors form part of the diplomatic team in the Embassies or High Commissions where they are located and hold the diplomatic role of 'Education Counsellor'.

Given our common objectives and responsibilities in the international education scholarships space, and reflecting each agency's strengths, ENZ partners with MFAT to deliver the Manaaki New Zealand Scholarship Programme, the government's single largest investment in international education scholarships.

There are also trade and international synergies with agencies such as Tourism New Zealand and New Zealand Trade and Enterprise and ENZ shares a similar operating model with them. Others such as the Human Rights Commission and the New Zealand Police, help support a safe and inclusive environment for international students studying in New Zealand.

Additionally, ENZ is working with NZ Inc agencies to improve New Zealand's resilience to foreign interference, including risks of economic coercion. As part of outreach programmes, ENZ is working with relevant NZ Inc agencies to raise awareness with the international education sector of foreign interference risks and to encourage the sector to develop risk-management strategies.

International education is one of the sectors supported by the [New Zealand Story](#), which works to enhance global perceptions and favourability of New Zealand. The New

Zealand Story taps into what makes our country special to not only drive demand for products and services, but also grow New Zealand's global reputation. ENZ contributes funding to the New Zealand Story and our Chief Executive sits on its Board. ENZ works to ensure that our activities support this broader promotion of New Zealand.

# INTRODUCING ENZ

Our outcome is to enable a thriving and globally connected New Zealand through world-class international education.

Education New Zealand Manapou ki te Ao is a Crown Agent with a dedicated focus on international education.

Our role is to work with others to deliver on the international education outcomes and services prioritised by the government for New Zealanders. In doing so, we uphold the purpose, principles and values of the public service when carrying out our functions.

Section 511 of the Education and Training Act 2020 sets out ENZ's functions (refer to Appendix 1) which include:

- promoting New Zealand education offshore
- providing information to international students in New Zealand
- undertaking research and providing intelligence
- managing, in collaboration with other government agencies, activities for the Government in relation to international education.

Our monitoring agencies are MoE (the lead agency) and MBIE.

## Our vision

ENZ's vision is "transforming lives through international education experiences". With this focus, ENZ will enable a thriving and globally connected New Zealand through world-class international education.

To fulfil our vision, ENZ targets international students and domestic students seeking an international education experience.

We work with the international education sector onshore and offshore, other New Zealand government agencies and offshore government partners, sector peak bodies,

New Zealand's regions and other governments. We also bring the international student voice into decision-making and broader promotion of New Zealand.

## Our people

### *Ngā Manapou*

ENZ's Ngā Manapou (principles):

- Aroha
- Manaakitanga
- Kaitiakitanga
- Be One
- Be Bold

These principles are foundational to ENZ's culture and set out how staff are expected to behave and interact with other people.

### *ENZ's Board*

ENZ is governed by a Board (profiled in Appendix 2) whom you appoint.

### *ENZ's staff*

Dr Linda Sissons has been appointed as the Acting Chief Executive while the Board recruits a new Chief Executive. She has taken a leave of absence from her role on the ENZ Board in order to fulfil this role.

Dr Sissons is supported by the Senior Leadership Team (profiled in Appendix 3).

On 30 September 2023, ENZ employed 98 staff (excluding the Manaaki Scholarship team) spread across the world. MFAT has agreed to fund 11 staff within ENZ to administer the Manaaki New Zealand Scholarship Programme.

Our offshore staff are generally co-located with other government agencies in Embassies and High Commissions (their

locations are shown in Appendix 4). These staff support the sector to operate offshore by:

- leveraging international diplomacy programmes
- enhancing government to government international education relationships
- brokering key relationships connecting New Zealand education to the world
- leading in-market initiatives
- gathering in-market intelligence
- promoting New Zealand education to prospective international students and education agents.

### ***He Rautaki Māori***

ENZ is implementing He Rautaki Māori, our Māori Strategy, by weaving the following Ngā Whaingā (key objectives) into our activities:

- partnering strategically with indigenous iwi/hapū and Māori providers to deliver international education with, and for, indigenous and Māori communities
- embedding the principles of ENZ's Te Tiriti o Waitangi framework into all facets of operation to present the

education system as valuing a Māori world view

- supporting public sector objectives in Māori-Crown relationships
- continuing to weave te reo me ōna tikanga into ENZ's purpose, which is to spread the word about the social, cultural and economic benefits of international education within New Zealand

### **ENZ's work to support Māori-Crown relationships**

ENZ Manapou ki te Ao is committed to giving practical effect to the Crown's Te Tiriti o Waitangi (Te Tiriti) responsibilities (including delivering on Ka Hikitia – Ka Hāpaitia<sup>17</sup> and Tau Mai Te Reo<sup>18</sup>) in our work and giving effect to Te Tiriti obligations in the Education and Training Act 2020. ENZ is committed to taking a wide and deliberate view of Te Tiriti across our structure, roles and functions to build a comprehensive and applied understanding of what it means for and how it can positively contribute to international education in practice.

<sup>17</sup> <https://www.education.govt.nz/our-work/overall-strategies-and-policies/ka-hikitia-ka-hapaitia/>

<sup>18</sup> <https://www.education.govt.nz/our-work/overall-strategies-and-policies/tau-mai-te-reo/>

# ENZ'S STRATEGIC FRAMEWORK



# ENZ'S ACTIVITIES TO REVIVE INTERNATIONAL EDUCATION

ENZ's activities are focused on supporting the government's priorities for reviving international education through:

- Attracting more inbound students (the key focus for 2023/24)
- supporting sector capability development
- strengthening global connections to grow international education
- supporting diversification of the sector to enable economic growth.

## Attracting more inbound students

ENZ is focusing the majority of its investment in the short term to growing inbound student attraction in eight countries: China, Germany, India, Japan, South Korea, Thailand, the USA and Viet Nam. We are also nurturing relationships in Brazil, Chile, Colombia, Indonesia, and Malaysia, as well as within Europe and the Middle East. ENZ continues to work with the sector to further explore diversifying the countries that New Zealand attracts international students from.

### ***Build preference for and promote New Zealand education***

Building prospective international students' interest, awareness and preference for a study destination is important as international education providers can then build on country awareness/preference to promote themselves and their education offerings.

ENZ worked with the sector and other government agencies to develop and launch the 'Learn New Every Day' campaign to improve awareness and preference for New Zealand as a study destination. To support the sector's recovery, the campaign has a strong focus on driving website sign ups and

enquiries to education providers via the Study with New Zealand website.

### ***Learn New Every Day***

In the first week of November 2023, ENZ launched a new global brand campaign. The campaign is highly targeted and focused on what makes a New Zealand education different. It brings the student experience to life in an upbeat, positive, TikTok-like manner.

View the 30-second video [here](#).

An essential component of all elements of brand awareness and preference is ENZ's [Study With New Zealand](#) website. Delivered in nine languages, the website gives prospective students all the information they need about why they should, and how they can study with New Zealand, including the ability to enquire directly to education providers.

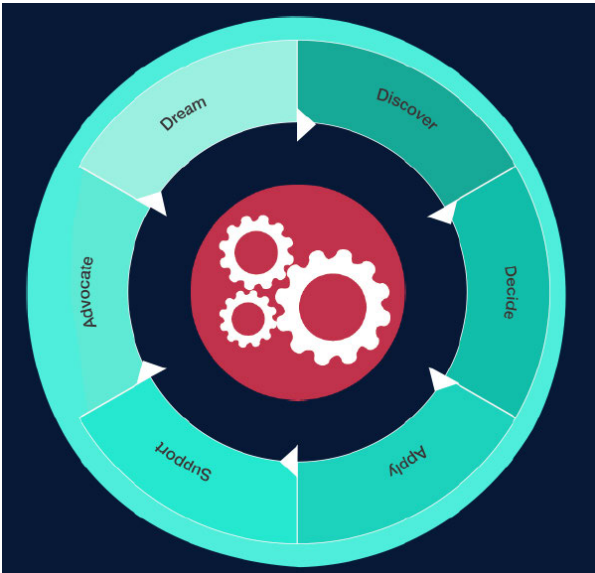
Alongside ENZ's Government-to-Government supporting activities, ministerial visits are an important component of our brand preference building activities. These visits are an opportunity to generate media coverage and engage with key stakeholders and influencers in-market. Along with MoE, we look forward to engaging with you on international engagement opportunities for 2024.

### ***Supporting an excellent student experience***

ENZ provides services to international students at all stages of their student journey to support their time here, which in turn helps with New Zealand's international education brand and offshore reputation.

[NauMai NZ](#), ENZ’s student experience portal, delivers consistent, relevant and accessible information for international students, via a single trusted source. For example, it provides information to support students prior to arriving in New Zealand on the cost of living, types of accommodation, visas and immigration, preparing to travel, and arriving in New Zealand. NauMai NZ contributes to supporting the sector to deliver on their student wellbeing responsibilities under the Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021.

*Diagram of the international student journey*



ENZ engages with international students and student networks, including the New Zealand International Students’ Association, to understand the issues and concerns of international students. We also survey international students at all stages of the student journey, including those who recently completed their studies, to understand their overall student experience. We share the resulting insights and intelligence with other agencies and with the sector to help inform their and our work.

## Supporting sector capability development

ENZ works with international education providers, sector peak bodies, and regional economic development agencies to strengthen capability. We continue to develop a deep understanding of New Zealand’s capacity and capability for international education.

ENZ’s immediate focus is to support the immediate capability needs to attract international students to New Zealand and support the student experience. Our activities will continue to evolve to reflect the changing needs of the sector.

Two key initiatives which ENZ invites the Minister to attend on an annual basis are:

- the quarterly International Education Peak Bodies Forum for providers who are focused on student mobility to engage with each other and the government agencies involved in international education. The purpose of the forum is to enable them to provide a clear collective voice to Government. The attendees represent over 90% of education providers involved in international student attraction.
- the annual New Zealand International Education Conference Ki Tua to bring together New Zealand’s international education sector to share good practice and explore strategies for future growth and development. It provides an opportunity to discuss, strategize and connect with expert speakers and delegates. In 2023, 599 delegates attended the two-day conference.

ENZ uses our expertise, research and insights to support education providers in taking advantage of new opportunities and assist in their decision-making. To do this, we undertake and share research with the sector, including research on market perceptions of quality and how New

Zealand's education is perceived internationally.

### ***Delivering insights about student mobility markets***

In August 2023, ENZ held a series of Insight Sessions on the Chinese, Indian and Latin American markets for private training establishments and English language schools in Auckland.

The insights shared, by ENZ's offshore-based staff, included key facts, policies, trends and observations about the individual markets, marketing channels and advice for student-recruitment activities, as well as opportunities and challenges for the sector.

The sessions highlighted the range of advice and support ENZ can provide and were welcomed by attendees. They were also an important tool for ENZ in gaining a better understanding of the needs of the providers so we can be more targeted in our approach to supporting them in the future.

To support education publishers and EdTech businesses, ENZ partners with the Publishers Association of New Zealand Te Rau o Tākupu and EdTech New Zealand to undertake research and strategic initiatives, and facilitate introductions and connections, including through the NZ Inc offshore network.

We also promote and market the benefits of New Zealand education and share data and insights into global and emerging markets with education publishers and EdTech businesses.

Education agents continue to be a key channel for attracting international students to New Zealand. As well as in-market initiatives to build awareness and preference for New

Zealand, ENZ provides education agents with tools, training, and information to promote New Zealand and support international students while they are here via AgentLab, a dedicated online space for education agents.

ENZ is evolving its agent engagement programme to support all agents to access information to support them to promote New Zealand accurately, and to support the primary relationship between education providers and education agents.

## **Strengthening global connections to grow international education**

### ***Global connections, research links and partnerships***

ENZ provides advice and guidance to international education providers who are interested in establishing and maintaining relationships with offshore education institutions. We foster institutional, academic and research relationships. ENZ also assists in undertaking Government-to-Government activities. We use our international relationships, data, and market intelligence to support the sector to leverage opportunities and position New Zealand as a high-quality education partner.

### ***The New Zealand Centre at Delhi's Indian Institute of Technology (IIT)***

ENZ worked with New Zealand's universities and supported their engagements with IIT Delhi to establish the New Zealand Centre in 2020. The Centre's purpose is to promote understanding and co-operation across diverse fields of academic and other sector engagement by:

- promoting joint research projects between IIT Delhi and New Zealand

- universities in areas important to both countries
- providing a forum for India-New Zealand dialogue among diverse sectors
  - undertaking projects to enhance New Zealand-India understanding and cooperation in research, teaching, publication, patents and start-up ventures.

Projects being funded by the Centre from July 2022 include genetic research, agriculture and wildlife conservation utilising drones, and behavioural research utilising virtual reality.

Through our offshore footprint, ENZ also supports the licence for our international education sector to operate. It enables an operating environment for the sector to attract international students and to develop and facilitate connections with a broad network of stakeholders and influencers in the international education ecosystem.

ENZ fosters and enhances key connections and beneficial partnerships in countries that contribute to a connected New Zealand and help improve New Zealand's reputation in education and global research connectivity over the long-term. We lead or support Government-to-Government activities and institutional and academic relationships.

Partnerships that deliver benefits for New Zealand play a key role in building strong foundations for the sector to operate within our target countries. Some of these flagship partnerships include:

- The Tripartite agreement with the Ministry of Education of the People's Republic of China to encourage the development of strategic research relationships
- The Gilman scholarship with the USA's Department of State to support students who have traditionally been underrepresented in study abroad

- The DAAD (German Academic Exchange Service) in Germany, and FAPESP (Sao Paulo Research Foundation) agreement in Brazil, research funding agreements to strengthen academic relations to promote cooperative and complementary research activities
- An agreement with the Hokkaido Board of Education in Japan to promote collaborative opportunities in education through shared interests including indigenous culture, primary industries and sport.

International education supports indigenous to indigenous links and relationships. ENZ draws on New Zealand's unique experience and relevance to position our nation as a suitable partner in countries where there is demand for indigenous education opportunities and collaboration. Our focus is to increase bilateral academic cooperation and research, and to position New Zealand as a country with a rich bicultural heritage and a unique global perspective.

### ***Prime Minister's Scholarships for Asia and Latin America***

ENZ helps New Zealand students to broaden their horizons and build life-long friendships and networks via the Prime Minister's Scholarship for Asia and the Prime Minister's Scholarship for Latin America. These scholarships support New Zealand's economic, trade and education priorities by enabling New Zealanders to enhance their skills through study or internships offshore across a wide range of courses and locations.

Close to 4,000 scholars have taken up a Prime Minister's Scholarship to Asia or Latin America since the scholarships were established in 2013 and 2016 respectively.



### *The scholarships in action*

Lupesina Koro left New Zealand in August 2019 to study engineering for one semester at Tecnológico de Monterrey in Queretaro, Mexico.

“My language skills came about from being immersed in the environment from day one. I knew that I was going to have to learn quickly,” she said.

Lupesina returned home enriched by her experience. Having never been away from her family, she says she has learned how to live independently and has become more resilient.

But perhaps most importantly, she has learned the value of global connections. “We are not as different as we think we are. We can be thousands of kilometres apart and may be brought up in very different circumstances, but our human values are likely to be very much the same.”

She is now working for an engineering and design consultancy.

A panel recently selected the recipients for the July/August 2023 scholarship round. We will work with your office to announce the awarding of these scholarships.

Excluding the recent selection round, ENZ has awarded 110 individual scholarships and 14 group scholarships with an expected total of 244 participants undertaking the scholarship since 2022.

Since the border re-opened, 509 recipients have travelled overseas to take up their scholarship, including many who had been awarded their scholarship before the start of the pandemic but had been unable to travel until now.

### **Manaaki New Zealand Scholarship Programme**

MFAT transferred responsibility for the operational management of the Manaaki New Zealand Scholarship Programme to ENZ on 1 November 2022. MFAT continues to remain responsible for setting the strategic direction, alumni relationships and funding the programme.

The Manaaki New Zealand Scholarship Programme is a key pillar of New Zealand’s international development co-operation, offering more than 1,300 scholarships annually to students from 75 eligible countries to study in New Zealand, in the Pacific, or online. In-line with New Zealand’s development and foreign policy priorities, the Pacific is a core focus of the programme. The Manaaki New Zealand Scholarship Programme represents the Government’s single largest investment in international scholarships and has been running for more than 70 years under various names.

Full international fees are paid for Manaaki New Zealand scholars who make positive contributions to the education sector by enhancing the diversity of countries represented, and in turn enhance the international character of the New Zealand education providers where they study.

A plan to optimise the scholarship operations, gain economies of scale and measure and maximise their impact is currently under way. ENZ also participates in joint governance of the Scholarship Programme. We provide data and insights to inform investment decisions, as well as operational management, drawing on our expertise in supporting a world-class scholar experience. The partnership also offers opportunities to develop closer connections between scholarship partners and tertiary education providers.

## Supporting diversification of the sector to enable economic growth

While attracting international students to New Zealand is vital in the revival of the sector, it is also important to have a sector that thrives in the long-term. The sector will need to be resilient in the face of the global trends that have already impacted and will continue to disrupt education more broadly.

ENZ's efforts to jointly explore greater diversification with the sector will support our efforts to build visibility and brand reputation.

### *Diversification of education products and services programme*

To support this vision, ENZ undertook a three-year \$10m programme funded from the COVID-19 Response and Recovery Fund (CRRF). The programme was designed to generate scalable insights and recommendations for Government, with a focus on how the sector could transform to become more sustainable and resilient. The programme explored ways to diversify New Zealand's educational offerings and modes of delivery while examining new ways to collaborate and partner with, and within, the sector.

CRRF funding enabled ENZ to:

- investigate the changed global landscape of tertiary education and work to

understand factors that could enhance the international education sector's responsiveness to evolving student preferences and industry needs in our key markets

- pilot a range of diverse international delivery models including all eight universities collaborating on shared pathways for international students seeking credit before coming to study in New Zealand; three Tiriti-led models; and 28 online learning pilots
- identify new "providers" of international education, including the EdTech subsector, and industry/business players considering including training/education services in their international offerings.

Earlier this year, ENZ held a series of activities with government agencies, iwi, sector and other industries to revive international education and facilitate thinking, ideas and solutions for a resilient future. The resulting themes along with the CRRF programme's findings will help shape the future of international education so that the sector can thrive in the long term and these will be shared with you. This will be developed in collaboration with government agencies, the sector and other industries.

# ENZ'S FUNDING

## ENZ's funding 2021/22-2023/24<sup>19</sup>

Revenue and expenditure summary (\$000s)	2021/22 Actuals	2022/23 Actuals	2023/24 Budget <sup>20</sup>
<b>Revenue</b>			
International Education Programmes	27,247	27,247	27,247
COVID-19 Response and Recovery Funding	7,150	4,000	-
Export Education Levy replacement funding	3,267	-	-
Tertiary Scholarships and Awards	3,750	3,750	3,750
Other revenue e.g. cost recoveries, interest	303	1,393	1,300
<b>Total revenue</b>	<b>41,717</b>	<b>36,390</b>	<b>32,297</b>
<b>Total expenditure</b>	<b>41,618</b>	<b>36,569</b>	<b>32,297</b>
<b>Net surplus/(deficit)</b>	<b>99</b>	<b>(179)</b>	<b>-</b>

ENZ receives its funding through two appropriations under Vote Tertiary Education, and excludes all the costs associated with the Manaaki New Zealand Scholarship Programme operated on MFAT's behalf.

Annual crown funding for the International Education Programmes appropriation is \$27.247 million. This funds all ENZ's activities except for payments made to Prime Minister's Scholarships for Asia and Latin America recipients.

The Tertiary Scholarships and Awards appropriation funding of \$3.75 million that is received by ENZ is ring-fenced to fund recipients of the Prime Minister's Scholarships for Asia and Latin America.

The changes in revenue have been due to:

- ENZ previously receiving \$3.267 million funding from the Export Education Levy in 2021/22. The removal of this funding reduced ENZ's promotion and marketing activities (including the New Zealand education brand), research, and professional

development of the international education sector

- One-off funding for brand awareness, marketing and communications, and work to diversify international education products and services to support the post-COVID rebuild was provided up until 2022/23.

ENZ is managing inflationary cost pressures on expenditure for marketing agency suppliers, NZ Inc offshore footprint charges, property lease costs, IT infrastructure, and travel which has resulted in only eight target markets being funded and minimal financial support being provided to fill sector capability gaps.

<sup>19</sup> ENZ's funding excludes the funding received from MFAT for the Manaaki New Zealand Scholarship Programme. The table reflects the funding appropriated by the Crown to ENZ plus revenue from costs recoveries and interest that can be spent to

deliver on ENZ's functions as set out in the Education and Training Act 2020.

<sup>20</sup> *Statement of Performance Expectations 2023/24*, ENZ (2023).

# ENGAGING WITH ENZ

ENZ provides you with fortnightly and quarterly reports as regular updates about our work and progress towards achieving the strategic intentions as outlined in ENZ's *Statement of Intent 2023-2027* and *Statement of Performance Expectations 2023/24*.

## 'No surprises' principle

We operate under a 'no-surprises' principle. This means we will keep you well-informed of matters of significance within your portfolio responsibilities that relate to ENZ and our role.

## Upcoming reports/briefings to the Minister

Title	Timing	Reason
Background on the Prime Minister's Scholarships for Asia and Latin America	Early December 2023	<ul style="list-style-type: none"> <li>Provide background information on the scholarships to support the media opportunity</li> <li>Seek agreement from the Prime Minister's Office to delegate the announcement to the Minister</li> </ul>
ENZ's Annual Report 2022/23	December 2023	<ul style="list-style-type: none"> <li>Tabling of the report in Parliament to meet the statutory requirements in the Crown Entities Act 2004</li> </ul>
s9(2)(f)(iv)		
International Student Experience Survey	December 2023/January 2024	<ul style="list-style-type: none"> <li>Inform the Minister of the 2023 survey findings</li> </ul>

## Other agencies reports that ENZ has contributed to

Lead agency	Title
MoE	International Engagement Opportunities for 2024

## Upcoming media opportunities

Title	Timing	Reason
Prime Minister's Scholarships for Asia and Latin America recipients	Early December 2023	<ul style="list-style-type: none"> <li>Announce the recipients of the July/August 2023 round</li> </ul>
Interviews with international education media	December 2023	<ul style="list-style-type: none"> <li>Outline the Government's vision and plans for international education and showcase New Zealand's education offering</li> </ul>

## Meeting with ENZ

Tracey Bridges, as the ENZ Board Chair, along with the Acting Chief Executive would like to discuss the points raised in this briefing with you. ENZ would like to work with your office to organise this meeting.

The ENZ Board Chair and Acting Chief Executive Dr Linda Sissons would like to request monthly agency/Minister meetings.

# APPENDIX 1: ENZ'S FUNCTIONS

ENZ's functions are specified in section 511 of the Education and Training Act 2020. Our statutory functions are to:

- deliver strategies, programmes and activities for promoting, together with providers and other government agencies, New Zealand education overseas
- promote New Zealand as an educational destination for international students
- promote the provision of New Zealand education and training services overseas
- manage, in collaboration with other government agencies, activities undertaken by representatives appointed to act on behalf of the New Zealand Government in relation to international education
- carry out research on international education markets and marketing strategies
- administer any international programmes or activities that are consistent with the Government's policy on international education
- provide information, advice, and assistance to providers on strategies to promote industry coordination and professional development
- provide information to international students about living and studying in New Zealand
- work with other agencies to ensure that international students are adequately supported while living and studying in New Zealand
- foster collaborative networks with former international students.

The section of the Act defines providers as any organisation that provides education, training, or education-related services.

## APPENDIX 2: ENZ'S BOARD

### Tracey Bridges | Chair



Tracey is a professional director and social entrepreneur with a background in strategy, leadership and behaviour change.

Her governance portfolio includes serving as Chair

of the Wellington Regional Economic Development Agency, and as a member of the boards of the Wellington Regional Stadium Trust, the Digital Media Trust, Whānau Āwhina Plunket, and WELLfed Charitable Trust. She is a Fellow of PRINZ and was a founder and former owner of trans-Tasman consultancy business, SenateSHJ.

Board term commenced: 1 April 2023.

Board term expires: 31 March 2026.

### Lyn Provost | Deputy Chair and Chair of the Audit and Risk Committee



Lyn Provost was Controller and Auditor-General from October 2009 until 2017. From 2001 to 2009 she was the first female and civilian Deputy Commissioner of New Zealand Police. Lyn

recently completed a six year term on the International Auditing and Assurance Board.

In 2016 she received the Global category award in the nationwide Women of Influence awards. In 2017, as part of the Queen's Birthday Honours List, Lyn was made a Companion of the New Zealand Order of Merit for services to the State.

Board term commenced: 1 September 2018.

Board term expires: 30 January 2025.

### Daniel Wilson



Daniel Wilson started his career in Auckland as a music teacher. After positions at several schools in Auckland and London, Daniel was appointed to the Leadership team at Manurewa High School in 2007, firstly as Deputy, then Associate Principal.

In 2015, Daniel moved to Nelson to take up the position of Principal at Nayland College. Daniel has extensive knowledge of international education from a secondary perspective, with Nayland College hosting approximately 80 international students from around the globe in 2020. Daniel also has a very good understanding of a range of markets and marketing approaches, having overseen a 40% increase in international student numbers since joining Nayland College.

As well as leading Nayland College, Daniel is also the Lead Principal and Governance Chairperson for the Top of the South Trades Academy. He has also acted as a Regional Engagement Lead for the recent National Certificate of Educational Achievement (NCEA) review. Over the years Daniel has, and continues to work with various national and regional advisory groups. In his spare time Daniel is an accomplished brass musician, playing trombone in a variety of musical groups around Nelson and serving as President of Nelson City Brass.

Board term commenced: 13 December 2019.

Board term expires: 15 March 2026.

## Rachael Tuwhangai



Rachael is a descendant of the Tainui Waka and of Ngāti Maniapoto. She is Co-Director of Māori and Pasifika Support Services (MAPSS) which focuses on the intersection between indigenous people's and

improving social outcomes. She is a former academic of the University of Auckland's Faculty of Education; Education Manager of the Auckland South Corrections Facility, and a former Secondary School Teacher.

Rachael's governance experience includes: NZQA, Manukau Institute of Technology, The Auckland Museum, Voyce: Whakarongo mai, Variety Children's Charity, Man Alive Charitable Trust, Auckland Community Law Centre and COMET Auckland.

Board term commenced: 1 September 2018.

Board term expires: 30 January 2025.

## Dr Therese Arseneau | Chair of the People, Culture, Safety and Wellbeing Committee



Dr Therese Arseneau has wide ranging governance experience including as Chair of the Board of ChristchurchNZ, Ara Institute of Canterbury, Regenerate Christchurch and the Christchurch Symphony Orchestra; and as

a Director of J Ballantyne Company Ltd, The Open Polytechnic of New Zealand Ltd, Enterprise North Canterbury and the Social Sciences Research Council of Canada.

Therese has over 30 years' experience in the tertiary education sector, including as a university lecturer in Canada and New

Zealand. A specialist in elections and New Zealand politics, she is currently an Adjunct Senior Fellow in Political Science at the University of Canterbury (UC) and in 2011 she received a UC Teaching Award for excellence in teaching. Therese holds a DPhil and MPhil from the University of Oxford, which she attended as an international student and Commonwealth Scholar.

Board term commenced: 1 April 2023.

Board term expires: 31 March 2026.

## Ziena Jalil



Formerly an international student, Ziena is an award-winning business and public sector leader, focused on deepening New Zealand's engagement with the Asia Pacific, and

improving outcomes for those with diverse cultures, abilities and experiences. She is Chief of Staff at Te Pūkenga, and a board member for Toka Tū Ake EQC, Asia New Zealand Foundation and DNA.

A former New Zealand Trade Commissioner to Singapore, Ziena has received several international awards for her work promoting New Zealand trade and education in Asia, where she was based in various roles for 10 years.

A member of the New Zealand Institute of Directors, Global Women and Asia 21, she holds a Master of Arts (First Class Hons) in International Relations and Politics, a Bachelor of Communication Studies, and Diploma of International Trade.

Board term commenced: 31 January 2022.

Board term expires: 30 January 2025.

## APPENDIX 3: ENZ'S SENIOR LEADERSHIP TEAM

### Dr Linda Sissons | Acting Chief Executive



Dr Linda Sissons has taken a leave of absence from the Board to be ENZ's Acting Chief Executive while a permanent appointee is recruited.

She is a highly experienced chief executive in the tertiary

education sector. Dr Sissons is currently the Chief Adviser Portfolio Strategy at Te Pūkenga. She was also a member of the NZIST Establishment Board (2019-2020).

Before that she was acting Chief Executive of UCOL, interim Chief Executive of Taratahi Agricultural Training Centre (2015-2016), Chief Executive of the Wellington Institute of Technology (2001-2015) and of Hutt Valley Polytechnic (1999-2001). In 2006, Dr Sissons was made a Companion of the New Zealand Order of Merit for services to tertiary education.

### Di Solomon | General Manager, Government Relation

Di is a public sector leader with over 16 years' experience working across a number of central and local government agencies. Her aim is to ensure New Zealand's international education sector is sustainable, globally connected and provides an excellent education experience. Formerly an international student, Di holds a Masters in Environmental Policy from Lincoln University.

Her team is responsible for Ministerial servicing, governance and risk, accountability and performance, and connecting ENZ to its government agencies partners.

### Ed Tuari | Manukura Chief Advisor Māori

Ed is of Ngāti Porou and Te Whanau-ā-Apanui descent and joined ENZ in 2017. He previously worked in Dubai, United Arab Emirates for 18 years. A former primary school teacher for 10 years, Ed has experience in providing Māori bi-lingual and immersion learning within the New Zealand primary school sector. Recently Ed was the Kaipupuri-Cultural Advisor of the New Zealand Pavilion, entrusted with Kaitiaki o te mouri for Expo 2020 Dubai.

As Manukura, Ed develops and leads the Rautaki Māori (ENZ's Māori Strategy), provides advice regarding cultural capability, and brings a Māori perspective to policy and project development. Ed enjoys engaging with onshore and offshore opportunities of indigenous development initiatives, working towards the preservation and maintenance of tribal culture and heritage, and indigenous networking.

### Geoff Bilbrough | General Manager, Marketing and Communications

Geoff is a senior corporate communications and marketing practitioner with a proven record of advising and delivering programmes for clients in the private and public sector. His experience includes ten years with Sweeney Vesty Limited; ten years with an integrated marketing communications agency in London; six years as the General Manager of the Hong Kong office of FleishmanHillard and a period at Acumen in Wellington.

His team leads ENZ's creative direction and marketing, acts as custodian of the brand, and provides strategic external communications and PR to support the sector.



### **Lisa Futschek | General Manager, International**

Lisa joined ENZ in 2013 after an 18-year diplomatic career with MFAT which included five years as the Deputy Head of Mission at the New Zealand Embassy in Berlin, and three years as First Secretary and Consul at the New Zealand Embassy in Santiago. She is a trained television director and a graduate of the University of Otago and the University of Auckland.

Her global team, based across 15 locations around the world, is focused on enhancing New Zealand's reputation as an education partner, creating the licence for the sector to operate and ensuring international education contributes to New Zealand's international relations goals.

### **Matt Penney | General Manager, Corporate Services**

Matt joined ENZ in October 2014. He previously held Financial Controller roles at Bathurst Resources and Contact Energy, and has worked in New Zealand, the United Kingdom and Ireland for various listed companies and a state-owned enterprise. Matt is a Chartered Accountant and has a Bachelor of Commerce and Administration from Victoria University of Wellington.

His team provides insightful analysis to the sector and ENZ, as well as strategic finance, budgeting and IT services and lead ENZ's business operations' planning and performance.

### **Sahinde Pala | General Manager, Sector Services**

Sahinde joined ENZ in 2016 after 18 years working for a multinational group of English

language schools. With a career dedicated to international education, she brought extensive private sector experience in international marketing, stakeholder engagement and student experience delivery to the organisation. Sahinde is based in our Auckland office.

Her team delivers a suite of products and services that support the sector to rebuild and thrive. This includes student experience, global citizenship, global events, and agent engagement, as well as scholarships to support domestic students to have an international education experience, and international students to study in New Zealand.

### **Wendy Kerr | General Manager, Sector Engagement**

Joining ENZ in 2022 from fintech Valocity where she was Global Chief Operations Officer, Wendy has rich experience in both education and commercial businesses globally. Prior to Valocity, she was Director of the Centre for Innovation and Entrepreneurship at the University of Auckland. She is a Board Director for the icehouse and Advisory Board Member for the Natural, Artificial and Organisational Intelligences Institute. Wendy has a Ngāti Mutunga and Mōriōri heritage and is based in our Auckland office.

Her team delivers strategic initiatives in partnership with sector partners and stakeholders, undertakes business development, and designs and delivers new products and services.

# APPENDIX 4: MAP OF ENZ'S LOCATIONS



## APPENDIX 5: GLOSSARY

Term	What it means
EdTech	Education technology
EdTechNZ	EdTech New Zealand, the peak body for education technology businesses
ENZ	Education New Zealand Manapou ki te Ao
GDP	Gross Domestic Product
INZ	Immigration New Zealand
International education providers or education providers	This term is used to describe New Zealand's English language schools, Te Pūkenga, private training establishments, schools and universities
International education sector or the sector	New Zealand's international education sector is made up of English language schools, schools, NZIST/Te Pūkenga, private training establishments, universities, wananga, education businesses (e.g. education technology, education publishing), education agents and New Zealand government agencies
International student mobility or student mobility	Students crossing geographical borders to obtain a portion or all of their education in a country other than their own.
International students	International students are non-residents of New Zealand and have expressly entered New Zealand with the intention of study or have enrolled with a New Zealand provider offshore.  ENZ counts international PhD students, exchange students, NZ Aid students (including Manaaki Scholarship students), foreign research postgraduate students and full fee-paying international students as international students
MBIE	Ministry of Business, Innovation and Employment
MFAT	Ministry of Foreign Affairs and Trade
MoE	Ministry of Education
NZ Inc	The collaboration of New Zealand government agencies, particularly when operating offshore. This includes agencies such as ENZ, Immigration New Zealand, Ministry of Foreign Affairs and Trade, and New Zealand Trade and Enterprise
NZQA	New Zealand Qualifications Authority
OECD	The Organisation for Economic Co-operation and Development
PTEs	Private training establishments
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
USA	United States of America