

Education New Zealand

Quarterly Report for 1 October to 31 December 2020

Proactive release

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ENZ's Leadership role

The onshore delivery of international education, which dominates New Zealand's international education sector, has been significantly disrupted by COVID-19. The impacts on the sector will continue to deepen and widen in 2021 as the New Zealand border is closed to nearly all students for Semester 1 2021. This will continue to affect the sector over the next few years due to the flow-on impacts to the pipeline of losing students who would undertake multiyear study in New Zealand.

COVID-19 has provided an opportunity to reset some sectors, including international education, to "build them back better". To achieve this, international education agencies need to clearly communicate the policy and operational decisions that will create the future state envisioned in the *International Education Strategy 2018-2030* (the Strategy) and the Strategic Recovery Plan for International Education (the Recovery Plan).

Whilst our overall outcome becomes challenging to achieve, Education New Zealand (ENZ) continued its work with the sector and is leading a comprehensible programme of work to deliver the strategic initiatives which support the implementation of the Recovery Plan and also addresses issues that have arisen in the international education system due to the outbreak of the COVID-19 pandemic. Some of the highlights include the roll out of the Tū Ngātahi student programme, a successful brand awareness campaigns and the achievement of the 2020 November global launch of a partnership with the UK-headquartered University Consortium (NCUK) networks to promote New Zealand as a destination for students studying pathway programmes in 81 study centres across 29 countries.

A balanced approach is needed as a viable international education sector will deliver social, cultural, economic and educational benefits. But at the same time, a carefully managed approach is needed to realise the Strategy's goals by clarifying the value that international education should deliver for New Zealand, reducing Crown risk and building social licence for international education in New Zealand.

To increase Ministers awareness of the wider benefits of international education to New Zealand and the impacts of COVID-19, ENZ created and sent an information pack to the Foreign Affairs, Trade and Export Growth, Economic and Regional Development and Immigration Ministers in addition to the Associate Ministers of Education. The pack talked about what international education is, the broad benefits it can deliver for New Zealand and New Zealanders, the sector had been resetting pre COVID-19 to reflect the expectations in the International Education Strategy, the significant and deepening impacts of COVID-19 and the New Zealand border closure and what the sector could look like in 2030 if the Recovery Plan is successfully implemented.

International education agencies are continuing to implement the Recovery Plan through the Chief Executives' Group. The General Managers Group met monthly to monitor implementation progress, endeavour to align work programmes and ensure issues are raised and discussed. This included agreeing that agencies need to have a shared understanding of value and what makes international education valuable to New Zealand, along with the risks that international education can pose to New Zealand. They discussed having a broader valuation of international education undertaken to better identify the benefits and costs.

To support the Chief Executives' Groups, a Joint Intelligence Group was established and is being chaired by ENZ's Director Insights. The Group aims to improve the sharing of data, information and insights across the international education agencies and thereby, improve decision making.

At the time of writing this report ENZ and the Ministry of Education (MoE) have mostly completed their engagement with the international education sector on the Recovery Plan. The sector views the key priority as allowing cohorts of international students to enter New Zealand and had sought

greater clarity about timeframes and next steps. The sector also wants increased alignment between government agencies. The sector wants to know how they can participate in agencies' work on policies and regulatory settings that would affect international education so any changes deliver the best outcomes while reducing the likelihood of any unintended consequences.

The Government's decision to allow a visa exemption for an initial cohort of 250 PhD and Master's students indicated that the deepening impacts of COVID-19 on the sector were being considered and reflected in the recent decisions about some visa exemptions. Confirmation of up to 1,000 Bachelor's and Master's degree students could enter from April 2021 has provided certainty about Semester 1 2021 entry to enable individual providers to make decisions about their future viability. ENZ will continue to work with the MoE to monitor the impact of the pressures on the managed isolation and quarantine system (MIQ) on the international student cohorts.

The challenges facing international education and ENZ remain, with ENZ focusing on the following challenges during the quarter:

- **Wellbeing of international students in New Zealand:** This was a focus for ENZ with the lead-up to the summer period. Maintaining the wellbeing of international students who remain in New Zealand over the summer in order to continue their studies in 2021 meant that ENZ worked to raise international students' awareness of the study, tourist and summer work opportunities available to them.
- **Supporting the re-entry of international students to New Zealand:** This has been a key priority for the sector, ENZ and the MoE. During the quarter, ENZ worked with the MoE and sector peak bodies on the 250-student cohort and other potential cohorts of students that could enter New Zealand in 2021. We have also been receiving suggestions for potential cohorts from the sector both in New Zealand and overseas.
- **Social licence in New Zealand:** ENZ's contracted research into New Zealanders' perceptions of international education was completed, with the results starting to be shared with the sector. ENZ also provided the information pack to other ministers to increase understanding of international education.
- **Maintaining visibility of New Zealand education internationally:** ENZ ran a Brand Protect campaign in selected markets to maintain awareness of the benefits of a New Zealand education. As this was ENZ's most successful campaign to date, ENZ then ran phase 2 of the campaign in additional markets and will run phase 2 in China from January 2021.

ENZ's work has been focused on challenges that are high priority for the international education sector as they continue to struggle with the growing impacts of COVID-19 on the sector. We expect that our work will evolve over the second half of 2020/21 to reflect the changing operating environment while ensuring that we deliver on the "Transforming to a more sustainable future state" workstream of the Recovery Plan. ENZ will also work to identify any new challenges and opportunities that emerge. In February 2021, ENZ will also start to develop its plans for 2021/22 taking into account our scenarios of what may occur to international education globally during that year.

Introduction

The report summarises ENZ's performance in delivering its strategic priorities and the outcomes of the Government's Strategic Recovery Plan for International Education (the Recovery Plan).

This quarterly report is assessed against ENZ's *Statement of Intent 2019-2023*, *Statement of Performance Expectations 2020/21*, *ENZ Business Plan 2020/21* and the Interim Letter of Expectations from Minister Hipkins.

These priorities support the implementation of the Recovery Plan and are organised under the following overarching themes and workstreams of the ENZ Business Plan 2020/21:

- Early return of students including student experience
- Innovation including a Pathways project
- International reputation including Brand positioning and protection including PR
- Social licence of international education in New Zealand, and New Zealanders' support for international education
- Building ENZ's capability.

ENZ monitors delivery against ENZ's Business Plan 2020/21 by regularly reviewing progress and management of risk and issues against the projects to anticipate and mitigate emerging risks and issues.

The third quarterly report will include further information of the outcome of ENZ's strategic initiatives and the implementation of the Recovery Plan.

ENZ's Operational update

ENZ is progressing work on implementing its component of the Recovery Plan through ENZ's Business Plan 2020/21 and convening the Chief Executives' Group to oversee the implementation of the Recovery Plan, along with delivering ENZ's strategic priorities and overall outcome in accordance with the *International Education Strategy 2018-2030*.

Project governance is managed within each applicable workstream to deliver detailed planning to ensure the delivery of outputs, outcomes and key milestones. ENZ's newly appointed Portfolio Director will oversee project management across all the Business Plan and Recovery Plan initiatives, and support the Senior Leadership Team managing these areas.

ENZ continues to make steady progress against delivering workstream outcomes and project outputs across the workstreams.

Overall management of strategic and high-level implementation risks and issues are discussed under the Risks section.

Recovery Plan Governance and Engagement Workstream

The Governance initiative looks after the establishment, monitoring and reporting of the General Managers and Chief Executives' Groups to drive, enable and influence the delivery of the Recovery Plan. It is delivered through a range of initiatives.

Key Activities

Highlights over the quarter

ENZ provided the chief executives with a copy of the broader valuation paper of international education to New Zealand. The General Managers' Group continued to meet monthly to monitor implementation progress, endeavour to align work programmes and ensure issues are raised and discussed.

Consultations with sector peak bodies on the Recovery Plan were largely completed during the quarter. Feedback from this engagement will inform a report from the Minister of Education to Cabinet to finalise the Recovery Plan.

ENZ has worked closely with the international education sector on implementing the Recovery Plan with the MoE to organise a series of engagements / workshops with the sector to progress key Recovery Plan work areas. This includes engagements on areas such as the early return of students, the unified digital learning platform and the coordination of messaging for international partners. Deep dive workshops are planned for the next reporting quarter in 2021 with each subsector to address the specific impacts being felt within each subsector, including the academic impact and the impact on domestic learners, social licence and medium-term student recruitment. These workshops will inform advice on the future implementation of the Recovery Plan and the priorities for future work between government and the sector.

The 2 December Immigration New Zealand (INZ)/ENZ Peak Bodies Forum meeting with international education peak bodies was positively received. The session included updates from Immigration New Zealand including Pathway Visas, and ENZ provided an update on its work including the Future Focus Programme and running brand protect campaign to maintain awareness of New Zealand international education and selected markets. ENZ also focused on the wellbeing of students throughout the year and retaining students over the summer period.

Early Return of Students Workstream

This workstream contributes to the overall outcome of ensuring that international students that are currently in New Zealand extend their education experience. This work underpins ENZ's readiness and the ability to capitalise once the borders are reopened. The workstream delivers its outcomes through the following initiatives:

- The Retention of existing students in New Zealand including both:
 - Early return of students to New Zealand
 - Retention of students in New Zealand
- The Waiting Room pipeline development
- Student experience (will be defined once short-term retention activity is underway).

Key Activities

Highlights over the quarter

Entry of international student cohort to New Zealand

ENZ supported Minister Hipkins' announcement regarding an exemption to enable 250 international post-graduate students (with a focus on PhD students) to enter New Zealand. ENZ communicated the decision to the sector ahead of the announcement, provided input and advice into this work and worked with the Ministry of Education (MoE) on the communications plan in preparation for the announcement.

Highlights over the quarter

Work was well progressed on identifying the first cohort of 250 international students to return to New Zealand with Universities nominating 194 PhD students. Following the MoE's high-level review, students will be able to apply to Immigration New Zealand (INZ) for a visa to return to New Zealand. [REDACTED]

[REDACTED] but high demand on the MIQ system means the first students are not likely to return to New Zealand until 2021¹. Withheld under s 9(2)(f)(iv) of the Official Information Act 1982

ENZ and MoE will work with providers to develop a process to identify students who meet the second priority group criteria to fill the 56 remaining places. ENZ also contributed to the work on facilitating the next cohort of 1,000 undergraduate and postgraduate students to come to New Zealand in 2021. It was anticipated that there will be a significant number of students who meet this priority group across universities, institutes of technology and polytechnics (ITPs) and private training establishments (PTEs). An ENZ staff member has been seconded on a part-time basis to the MoE for the rest of 2020 to assist with this work.

Retention of existing international students

An online programme of events is being developed for international students in New Zealand and will run from November to January. This work is focused on student wellbeing and keeping students connected. New pages on NauMai NZ went live in October to provide advice and information on options and activities to keep international students in New Zealand engaged and connected over the summer period. Students whose programmes are due to finish this year are also being encouraged to consider further programmes of study in New Zealand including promotion via INZ channels.

The 'Your Great Kiwi Summer' fair was held on 31 October, with 130 people attending. Feedback from students was that the event was a useful source of information. Content from the fair will be repurposed for the 'Your summer in New Zealand' webpages. As an inaugural event for international students in New Zealand, it provided ENZ with useful data about student behaviour to inform the design of future events. Work will continue to drive students to the 'Summer in New Zealand' webpages and to highlight the online programme of events that will be hosted over summer.

The activities aimed at retaining international students over the summer period continued with an Instagram Live² series underway. A session on student well-being facilitated by the Asian Family Services, was well-received with over 600 views since it was filmed at the end of November. International students from the school and tertiary education sectors have shared their experiences and coping strategies for being away from their families at this time. Further sessions will be run on employability skills development, LinkedIn tips and tricks and Prime Minister's Scholarships alumni will share their advice for summer.

To encourage international students to develop new skills over the summer period, ENZ has partnered with LinkedIn Learning³ to provide 5,000 3-month licences to access LinkedIn Learning's modules until the end of February 2021. Licences were offered to all Great Kiwi Summer fair attendees and to international students via education providers.

ENZ is also working with the Ministry for Primary Industries to showcase the horticulture and viticulture job opportunities available over summer. Any promotion of these opportunities will be accompanied with strong advice regarding work rights and where to go if problems arise with an employer, to mitigate any risk of students being exploited.

The long-term retention strategy and regional engagement proposal is approved, and research approach is being scoped during the quarter.

NauMai NZ

Since September, ENZ has created new 'Summer in New Zealand' content on NauMai NZ. The content covers potential further study options, wellbeing information and advice, tips on travelling around New Zealand over the holidays featuring regional content and employability skills development resources. A communications campaign has encouraged international students to visit the platform and to make the most of their time in New Zealand over the summer. The pages have had over 5,000 visits to date.

¹ By the end of January 2021 there were 12 international students in New Zealand.

² This is a feature within Instagram Stories that allows users to broadcast live videos to other users on Instagram.

³ This LinkedIn subsidiary offers video courses taught by industry experts in software, creative and business skills.

Highlights over the quarter

The NauMai NZ WeChat mini-programme, which was launched on 22 October to provide support to Chinese international students who prefer to navigate within the WeChat ecosystem, has had over 700 registrations since its launch in October. The NauMai NZ database continues to grow.

ENZ ran a Tencent Live session to promote the mini-programme and 'Summer in NZ' on 28 October. The session had 874 visits and 7,300 likes. A second livestream session on 'Employability' took place in late November receiving 600 page visits and 3,750 likes. Ongoing promotion of the mini programme will continue to grow the community.

Tū Ngātahi

ENZ's domestic programme of activity that enables the sector to express support for international students in New Zealand was launched to the international education sector on 22 October and to the public on 26 October. ENZ has received encouraging feedback from the sector and others, including the New Zealand Police and the Race Relations Commissioner. Auckland Tourism, Events and Economic Development produced a video with Auckland Mayor Phil Goff that spoke directly to international students, and they proactively opted to include the Tū Ngātahi in their video.

Tū Ngātahi continues to be well received by the sector and other stakeholders. It has also been used at the *Waikato Student Summer* event and the Wellington International Students Excellence Awards. The sector continues to ask for additional Tū Ngātahi pins and digital assets to support their activities. While this project has been completed, ENZ is looking how to continue to leverage Tū Ngātahi's positive reception in 2021.

Student experience

Kāhui Oranga, ENZ's cross-team student wellbeing group, has a current focus for the summer period on ensuring international students are well-connected to mental health support resources.

ENZ attended the annual Student Voice Summit on 20 November. The Summit was jointly hosted by the New Zealand Union of Students' Associations, Te Mana Ākonga (National Māori Tertiary Students' Association), Tauria Pasifika (the National Voice of Pasifika tertiary students), the New Zealand International Students' Association and Academic Quality Agency. ENZ participated in the Aotearoa and International Developments in Student Voice panel discussion which included a mix of agency, institution and student voices. The panellists shared their thoughts on how the student voice could be strengthened and the good practice that currently supports that.

Social licence of international education in New Zealand Workstream:

The workstream aims to ensure that international education is understood and valued as a key component of New Zealand's rebuild by New Zealanders and a broad range of stakeholders. Another objective is to ensure that ENZ is seen as a trusted leader of international education and is supported by the sector, government agencies and other stakeholders. The workstream delivers these outcomes through the following initiatives:

- Creating a national conversation on the future state of international education in New Zealand,
- Broader sector value (creating broad national recognition of the wider benefits of international education),
- Undertaking research, which includes measuring the social, cultural and economic contribution of international education to New Zealand.

Key Activities

Highlights over the quarter

Research

Highlights over the quarter

ENZ engaged The Research Agency Ltd (TRA) to source research insights to understand New Zealanders current perceptions of international education. These insights will inform development of a social licence strategy and messaging toolkits for peak bodies and New Zealand education providers. The quantitative survey into how aspects of international education do or do not align with New Zealanders' values and beliefs survey was completed and preliminary findings were presented to ENZ to ensure the research is shaped in the most useful way to provide guidance for the development of a national conversation.

The final report was produced in November. The research found that half of respondents were enthusiastic champions for international education. While the remaining respondents had limited awareness of international education, they became strongly supportive when told about the benefits. There were very few detractors. In addition, two thirds of respondents were positive about students returning to New Zealand by the end of 2021. TRA presented interim insights from the qualitative survey to the Peak Body Forum, Institutes of Technology and Polytechnics International group, and University Communications Directors. ENZ continues to work with TRA to share findings externally and workshop messaging frameworks to inform future work.

ENZ also partnered with the International Education Association of Australia Research Committee on a project to explore domestic university students' attitudes and behaviours towards international students in New Zealand and Australia and public vocational and educational training providers in Australia.

International reputation Workstream:

The workstream is focused on ensuring that New Zealand's strong country brand sentiment is leveraged to increase preference for New Zealand education. Work is underway to define and deliver the evolution of the brand over the next 24 months. Highlights include extending the brand beyond student recruitment and integrating it with our global PR strategy. The workstream achieves the delivery of its objectives through the following initiatives:

- Brand positioning and protection including PR,
- Using global initiatives to build and strengthen partnerships and academic reciprocity,
- Achieve the strengthening of New Zealand's education brand by leveraging alumni to better use New Zealand's international alumni.

Key Activities

Highlights over the quarter

Brand protect campaign extension

The extension of the brand protect campaign was run in Viet Nam, United Kingdom and Indonesia between 23 November and 23 December. The campaign is centred on high-level brand positioning and is intended to reposition the 'Think New' brand for long-term brand building while New Zealand's borders are closed, focusing on building familiarity with the I AM NEW message. The content of the campaign is intentionally high-level and emotive, reasserting New Zealand's values. A landing page was subsequently added with information following the launch of the UK-headquartered University Consortium (NCUK) Pathways project⁴. A variation of the brand protect campaign will be launched in China in January 2021.

Long-term brand strategy

Scoping began for a major global education brand campaign, proposed for launch in May 2021. ENZ, our creative agency Special Group, and project management support Ghost Partners are in the early stages of creative territory exploration.

⁴ You announced this partnership between ENZ, Universities New Zealand (UNZ) and NCUK at the Peak Bodies Forum.

Highlights over the quarter

Under global initiatives and academic reciprocity a range of activities are being delivered for the September to December period (e.g. the China Education Week and the Kōrerorero and Masterclass Series). Detailed planning for January to June 2021 initiatives commenced in November.

ENZ Recognised Agency (ENZRA) Programme

ENZ supports education agents via activities such as the ENZRA Programme, webinars and funding provided to agents to undertake small scale promotional/awareness raising activities.

As a response to the impacts of COVID-19, ENZ postponed the annual review and application period for ENZRA from 31 October 2020 to February 2022 to acknowledge the limits on the number of international students being able to enter New Zealand for the foreseeable future. All current Recognised Agencies remain in the ENZRA Programme upon signing an updated participation agreement and undergoing a review of conduct with assistance from Immigration New Zealand. New education agencies will not be able to join the programme at this time.

The ENZ Recognised Agency programme renewal process is planned to be completed in the next quarter and the 2021 list of 309 ENZRA will be available on the [Study in New Zealand](#) website followed by a public announcement in February 2021 for the wider industry.

The last agent webinar of 2020 took place on 9 December. It was an opportunity for agents to find out from ENZ Brand team about the latest ENZ brand update and how agents can make the most of the assets and resources available to them to promote New Zealand as a study destination with a total of 104 viewers over two sessions.

Education Cooperation Arrangement

ENZ and the Hokkaido Board of Education in Japan signed the Arrangement on Education Cooperation on 16 November on Zoom with Hamish Cooper, Ambassador from New Zealand to Japan attending. The virtual signing ceremony was aired by Japan's public broadcasting service. The agreement promotes collaborative opportunities in education through shared interests including indigenous culture, primary industries, and rugby.

This is an illustration of ENZ's focus to continue to build New Zealand's educational government-to-government relationships with agreements including support of the 'Strengthening the system' workstream of the Recovery Plan.

New Zealand Education Week in China

As part of the annual New Zealand Education Week in China, ENZ co-hosted the inaugural New Zealand-China Early Childhood Education Symposium with support from Ministry of Education of China with a session delivered by the New Zealand Ministry of Education. New Zealand and Chinese officials expressed support for continuing the dialogue around early childhood education. Agent seminars also saw over 500 Chinese agents and counsellors attend sessions and have one-on-one meetings with the 44 New Zealand exhibitors.

Webinar series

ENZ held the webinar series with five episodes 'Kōrerorero Sessions – Conversations that matter' episodes on Zoom and livestreamed on YouTube and <https://enz.govt.nz/korerorero> website to promote New Zealand's academic excellence and their connections to New Zealand's innovative business sector in key economic areas. The series seeks to build on the increased positive presence of New Zealand in Latin American media due to New Zealand's response to COVID-19.

Innovation Workstream:

The workstream supports the international education sector to adopt non-traditional approaches to the delivery of international education. The workstream achieves its outcomes through five initiatives:

- Explore, develop new products and services
- Piloting offshore delivery (Pathways Project)
- Exploring online learning (UDLP)
- Repurposing the Prime Minister's Scholarships and;
- Supporting Te Pūkenga.

Key Activities

Highlights over the quarter

Piloting offshore delivery

ENZ's is leading the Pathways Project to deliver an initiative aimed at enabling students to do one to two years of study in their home country and then enter any of New Zealand's eight universities' Bachelor's or Master's degree programmes. This work promotes education pathways for students to begin their study journey to New Zealand from their home country and aims to build the university sector's transnational education capability and intellectual property over time.

To achieve this ENZ supported the 30 November 2020 global launch of the partnership through marketing, public relations and business development support across ENZ and NCUK networks, supported by launches in priority markets such as China and Viet Nam to promote New Zealand as a destination for students studying pathway programmes in 81 study centres across 29 countries.

New Zealand universities have committed more than \$200,000 per year in scholarships and the NCUK Foundation Year programme has been recognised as meeting the entrance requirements for Bachelor's degree study for all eight universities.

The partnership will enable New Zealand qualification delivery in source markets as part of the second phase and provide for the sector's sustainable growth by enhancing resilience to changes in short-term outbound mobility from source markets.

ENZ is also extending the functionality of the [Study in New Zealand](#) to promote education options that enable students to start their study from their home country. ENZ is continuing to progress further phases of the project, including dedicated New Zealand Study Centres.

Unified Digital Learning Platform

To undertake the exploration of online delivery via the UDLP, the process for the feasibility study and engagement plan have been drafted and the Recovery Plan funding has been approved for release.

Explore and develop new products and services

The New Zealand Global Competence Certificate pilot with 71 students was successfully run and has been expanded in November. The Certificate is an online programme for secondary school students that teaches self-awareness, empathy for other cultures and ways to build bridges in multicultural settings. ENZ negotiated a bulk deal for this programme which is being delivered by Massey University. ENZ aims to have 500 people complete the programme by June 2021. ENZ also secured an 18-year-old+ version of the programme as part of the deal and will target existing international and domestic tertiary students.

ENZ initiated the development of a customised version of AFS's Global Competency Certificate (GCC), tailored for virtual delivery to Year 10 school students in Viet Nam and New Zealand. ENZ is funding 25 Vietnamese students from TTC Education⁵ while Central Economic Development Agency and Palmerston North City Council provide scholarships to 27 students from Manawatū schools. There is interest in the Certificate with cohorts confirmed from Long Bay College (Auckland), Suzhou School (China) and Massey University Mobility scholarship. Four further cohorts have been proposed. The first virtual class under the Viet Nam – New Zealand Global Competency Certificate project was run on 2 November. This project shows ENZ's commitment to support New Zealand schools' activities in Viet Nam and promotes the development of global citizens in New Zealand.

Te Pūkenga

ENZ continued strong engagements with Te Pūkenga and the ITP sector to explore the elements of an international education operating model which is effective, efficient and unifies the sub-sector. Further meetings will be held to discuss the sub-sector, its brands and messages in international markets and how

⁵ TTC Education is ENZ's private school network partner in Viet Nam with over 18,000 students.

Highlights over the quarter

government agencies can best support Te Pūkenga and its subsidiaries approach to international education.

ENZ is exploring ways to further support Te Pūkenga by developing an operating model for international education. ENZ is also concurrently initiating a plan to take Te Pūkenga and its brand story offshore, when appropriate, providing an opportunity to reset the sub-sector and its proposition internationally.

Future Focus Programme (FFP)

In response to English New Zealand's (English NZ's) request, ENZ has repurposed \$120,000 of the \$200,000 FFP funding for the English language sub-sector to help support the peak body's ongoing operation until 30 June 2022. [REDACTED]

[REDACTED] Withheld under s 9(2)(b)(ii) of the Official Information Act 1982

This funding will ensure that ENZ and other government agencies continue to have a channel to work with the sub-sector while delivering on the aims of the FFP. English NZ will deliver a range of services including those relating to sector engagement, monitoring and delivery of the Advanced Pathway Assessment⁶, input into immigration and education policy, quality assurance, professional development, marketing, data collection and collaboration with the tourism sector.

Risks and Issues Management

This section describes ENZ's monitoring and reporting mechanism for managing risks and issues to maintain oversight and provide assurance over the initiatives of ENZ's Business Plan 2020/21.

To maintain high level oversight over ENZ's strategic objectives and manage risks and issues effectively, ENZ's strategic issues and risks are regularly reviewed by the Audit and Risk Committee which provides independent assurance related to ENZ's strategic risks. ENZ's senior leadership team also undertakes monthly risk reporting to ensure the mitigation plans are in place, managed and effective.

Risk management decisions for initiatives under the ENZ's Business Plan 2020/21 are managed within each workstream as the projects routinely identify, assess, manage and review their risks against established project objectives.

⁶ As part of a Memorandum of Understanding between English New Zealand and Universities New Zealand, all eight universities accept the Accredited Pathways Assessment of approved English New Zealand members as evidence of meeting English language proficiency requirements at an undergraduate or postgraduate level.

Our organisational development

Building ENZ's capability Workstream

The workstream delivers its agreed outcomes through six initiatives and ten projects to ensure that ENZ has the capability, systems, and processes to deliver its priorities within the changed operating environment. ENZ supported staff adapting to new projects and roles to meet the challenges and take advantage of the opportunities arising by offering staff opportunities to develop their skills and experience beyond their usual roles. There has been wide uptake from staff with strongly positive recognition about this approach.

Key Activities

Highlights of achievements over the quarter

Ngā Manapou implementation

Earlier this year, Ngā Manapou, a new set of ENZ integrated principles, was launched. To ensure these principles are embraced and understood across ENZ, Ngā Mana Toa (Champions) are being nominated, by onshore and offshore staff. The Ngā Mana Toa will exemplify, promote and demonstrate Ngā Manapou principles daily in their work.

ENZ Manapou ki te Ao was counted amongst the more than one million people who took part in the 2020 Māori Language Moment. As part of Te Wiki o te Reo Māori, we launched the ENZ waiata Manapou ki te Ao which Te Taura Whiri i te Reo Māori (the Māori Language Commission) featured on the Tuku Reo Māori website as an inspired Māori language moment.

ENZ and Te Taura Whiri i te Reo Māori (the Māori Language Commission) are in discussions with the aim of re-signing the Mahitahi (Collective) Agreement for three years as the current agreement is due for review in the next quarter.

ENZ attended the first cross agency meeting with the MoE, New Zealand Qualifications Authority, Tertiary Education Commission and Education Review Office to look how to support the implementation of Ka Hikitia and Tau Mai Te Reo⁷. Rautaki Māori input and participation in ENZ's student showcases, international webinars, events, and presentations has increased and a supportive strategy to meet demand is being developed.

⁷ This is a cross-agency Māori language in Education Strategy for all learners. It sets out the goals that agencies are seeking to achieve and provides a framework for coordinating our programmes and services that support Māori language in Māori medium and English medium education.

Financial performance to 31 December 2020

STATEMENT OF FINANCIAL PERFORMANCE	For the 6 months to 31 December		
	Actual 2020/21	Budget 2020/21	Actual 2019/20
\$000s			
Operating Revenue			
Revenue from the Crown - Operating	15,095	15,235	13,766
Revenue from the Crown - EEL	1,633	1,633	1,632
Other revenue	195	284	1,948
Total operating revenue	16,923	17,152	17,346
Scholarship Revenue			
Revenue from the Crown - scholarships	2,019	2,025	2,175
Total scholarship revenue	2,019	2,025	2,175
Operating Expenditure			
Personnel costs	6,942	6,761	6,875
Other expenses	6,125	7,518	10,411
Depreciation & amortisation expenses	137	152	213
Total operating expenditure	13,204	14,431	17,499
Scholarship expenditure			
Scholarship expenses	77	1,400	1,575
Total scholarship expenditure	77	1,400	1,575
Net surplus	5,661	3,346	447

STATEMENT OF FINANCIAL POSITION	As at 31 December		
	Actual 2020/21	Budget 2020/21	Actual 2019/20
\$000s			
Assets			
Total current assets	11,873	9,344	6,338
Total non-current assets	465	450	630
Total assets	12,338	9,794	6,968
Liabilities			
Total current liabilities	3,635	4,000	3,902
Total non-current liabilities	230	-	171
Total liabilities	3,865	4,000	4,073
Net assets	8,472	5,794	2,895

Our year-to-date surplus of \$5.6m was \$2.3m higher than budget at the end of December. The main drivers of the year-to-date underspend are:

- significantly reduced travel
- assumptions we made around the timing of in-market events and fairs and impact projects which we could not meet due to restrictions delivering in the markets
- delays spending against the strategic initiatives, and
- cancellation of round one of the Prime Minister's Scholarships for Asia and Latin America.

Of our core International Education Programmes expenditure, excluding Scholarships, we have spent \$13.2m after six months and have another \$22m to spend in the next six months to 30 June

2021. The difference between the first half and second half forecasted spend is mostly made up of the strategic initiatives yet to incur cost.

ENZ's Board Chair and Chief Executive met with you in late January and raised the prospect of transferring budget from 2021/22 to next year due to external circumstances creating delayed expenditure. In a follow up discussion, the Secretary of Education supported this approach.

ENZ's financial review

ENZ will undertake its financial review and analysis of critical success factors in the next quarter with the aim of reporting on the results to you in April 2021 after Board approval.

[REDACTED]

Withheld under s 9(2)(f)(iv) of the Official Information Act 1982

ENZ will present the financial review to you, with connections into policy reports such as the report back on the Recovery Plan. The performance measures will start to be developed in parallel with the financial review and will go to you for review via ENZ's Statement of Performance Expectations 2021/22, however this may be completed after the financial review has been finalised. The results of the financial review will be reflected in ENZ's planning for the coming year.

Proactive Release

ENZ's Impact, Performance and Organisational measures

Impact measures

	Target 2020/21	2018/19 Full Year Result	2019/20 Full Year Result	2020/21 YTD Result	On Track ⁸	Comment
International student perceptions of education quality.	2020: 8.2 out of 10	2019: 7.8 out of 10	2020: 7.8 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.	2020: Increase	New baseline in 2019/20	88%		●	ENZ plans to run the survey in semester one 2021.
The economic value from New Zealand's international education sector.	2020: Maintain	2018: \$4.94 billion	2019: \$5.23 billion		●	The result will be reported in Q4.
The economic value per international student.	2020: Increase	2018: \$39,000	2019: \$44,951		●	The result will be reported in Q4.
The percentage of international students enrolled to study outside Auckland.	2020: Increase	2018: 44%	2019: 45%		●	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.	2020: Decrease	2018: 51.6% of economic value to New Zealand	2019: 50.4% of the onshore economic value to New Zealand		●	The result will be reported in Q4.
Awareness of the contribution of international education to New Zealand.	2019/20: Increase	2018/19: 58%	Not surveyed ⁹		●	The result will be reported in Q4.

⁸ Key: ✓ on track to achieve full year target

× target not met

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

NA result is not yet available, but will be included in the Annual Report 2020//21

⁹ Due to the significant impact of COVID-19, ENZ did not survey New Zealanders about their perceptions.

Performance measures

The financial and non-financial information set out in our Statement of Performance Expectations 2020/21 (SPE) were developed prior to COVID-19 and have been impacted by the pandemic. The extent of this impact means that some of the measures set out are no longer relevant / unable to be met or measured, or that new measures are required..

	Target 2020/21	2018/19 Full Year Result	2019/20 Full Year Result	2020/21 YTD Result	On Track ¹⁰	Comment
Percentage of facilitated customers that agree ENZ's services and support have added value to their organisation.	≥ 75%	93%	Not surveyed ¹¹		●	The result will be reported in Q4.
Percentage of Active Visits on ENZ's studyinnewzealand.govt.nz website.	≥ 75%	77%	77%	76%	✓	
Number of registrations to ENZ's Student Membership Programme through studyinnewzealand.govt.nz website.	80-100,000	New measure in 2019/20	93,052	43,164	✓	
Number of registrations to NauMai NZ.	2,800	New measure in 2019/20	6,263	2,598	✓	
Number of key messages about the benefits to New Zealand from international education delivered by third parties.	100	156	127	89	✓	
Percentage of users satisfied with the information and intelligence provided by ENZ.	≥ 87% of users rate it as good or higher	78% of industry users rated ENZ's information and intelligence as 'good' or higher	Not surveyed ¹²		●	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%	55%		×	There are no outbound scholarships due to border closures. ENZ does not expect to be able to report on this measure for 2020/21.

¹⁰ Key: ✓ on track to achieve full year target

× target not met

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

¹¹ Due to the significant impact of COVID-19 on the international education sector and the cross-agency work to provide communications and support to the international education sector, ENZ did not survey the sector about ENZ's work.

¹² Due to the significant impact of COVID-19 on the international education sector and the cross-agency work to provide communications and support to the international education sector, ENZ did not survey the sector about ENZ's work.

	Target 2020/21	2018/19 Full Year Result	2019/20 Full Year Result	2020/21 YTD Result	On Track ¹⁰	Comment
Percentage of Prime Minister's Scholarship recipients who report making five or more academic connections during their time on scholarship.	≥ 60%	52%	53%		*	There are no outbound scholarships due to border closures. ENZ does not expect to be able to report on this measure for 2020/21.

Activity indicator

	2020/21 Activity Standard	2018/19 Full Year Result	2019/20 Full Year Result	2020/21 YTD Result	On Track ¹³	Comment
Number of New Zealand International Doctoral Research Scholarships funded.	10-20	27	20	10	✓	

Organisational capability

	2020/21 Target	2018/19 Full Year Result	2019/20 Full Year Result	2021/21 YTD Result	On Track ¹³	Comment
Employee engagement.	Increase	New baseline established	66% favourable		●	The result will be reported in Q4.

¹³ Key: ✓ on track to achieve full year target

* target not met

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