
STATEMENT OF INTENT

2018-2022



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MESSAGE FROM BOARD CHAIR

As the only government agency focused solely on international education, Education New Zealand (ENZ) is working at the intersection of industry, government and students to ensure that New Zealand benefits from international education now and in the future. This Statement of Intent 2018-2022 (SoI) sets out ENZ's future focus with a refreshed set of four strategic priorities.

As we go to print on this SoI the Government has just completed consultations on a new International Education Strategy and is still consulting on potentially substantial changes to immigration policy settings that might affect international student demand. The Strategy will set the strategic direction for the sector as a whole for the period of this SoI. Immigration policy changes could likewise have material impact. As both the Strategy and immigration policies are yet to be finalised I note that it might be necessary for ENZ to review our internal strategy and our priorities relatively quickly. This document has been prepared on the basis of existing policy settings.

New Zealand relies on international trade, global partnerships and the exchange of ideas to prosper. International education, whether Kiwis studying abroad, international students coming to New Zealand or New Zealand institutions and businesses providing services offshore, plays a vital role in strengthening links between New Zealand and the rest of the world.



Charles Finny | Board Chair

7 June 2018

International education is also one of New Zealand's key exports, supporting 33,000 New Zealand jobs and contributing \$4.4 billion to GDP.

Unprecedented global demand for international education over the past five years has seen rapid growth in international student numbers, and significant increases in earnings from New Zealand's international education activities. Over the past two years, ENZ and other government agencies have focused their efforts on value and quality in international education, and on encouraging more regional growth and market diversity. As a result, the sector has undergone rebalancing from high volume to high value and we are now in a good position to achieve further, sustainable growth.

We will provide the thought leadership needed to ensure the sector remains successful in an increasingly crowded market. New Zealand's education providers will need to continue to build and maintain strong and enduring relationships, add value beyond simple transactions and deliver an exceptional student experience.

I would like to acknowledge the work of other government agencies who are committed to supporting international education. We will continue to work with the sector and with agencies to grow a sustainable international education sector that delivers the widest possible benefits for New Zealand.



Philip Broughton | Board Member

7 June 2018



ABOUT EDUCATION NEW ZEALAND

Our purpose is to take New Zealand’s education experiences to the world for enduring economic, social and cultural benefits.

Who we are

ENZ is a Crown Agency and the only New Zealand government agency solely focused on international education. Our role is to provide a range of marketing, promotion and representation functions to give effect to the Government’s goals for international education. The Ministry of Education and the Ministry of Business, Innovation and Employment are our monitoring agencies.

In New Zealand, we have staff in Auckland, Wellington and Christchurch. Offshore we have staff in Brazil, Chile, China, Germany, India, Indonesia, Japan, Malaysia, Republic of Korea (Korea), Saudi Arabia, Singapore, Taiwan, Thailand, the United States of America and Viet Nam. ENZ’s offshore staff are usually co-located with the Ministry of

Foreign Affairs and Trade or with New Zealand Trade and Enterprise.

Our statutory functions are shown in Appendix One.

Who we work with

We work with New Zealand’s diverse international education providers, including universities, institutes of technology and polytechnics (ITPs), industry training organisations, private training establishments (PTEs), English language schools (ELS) and schools. We also work with education agents, and organisations that export education services, such as publishers, consultancy services and education technology businesses.

We engage with international students¹ at all stages of the student journey – from those who



¹ 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, foreign research postgraduate students and full fee-paying international students as international students.

are just beginning to dream about a New Zealand study experience through to alumni enjoying successful careers all around the globe.

Through the Prime Minister’s Scholarship programme, we work with New Zealand students by supporting overseas study opportunities that help develop their international skills.

The next four years

ENZ has a lead role in ensuring that the international education sector thrives both now and in the future. We will be thought leaders and strategic partners for other agencies and international education providers. We will do this by:

- leading international education thinking
- promoting New Zealand’s quality education
- growing sustainable international education
- developing global citizens

More details about these activities are contained in pages 15 to 24.

Our Board

ENZ’s Board is made up of between five and seven members appointed by the Minister of Education. The Board is responsible for the governance of the organisation, including setting its strategic direction and monitoring

performance. The Board meets regularly to carry out governance functions and address major challenges that impact on international education in New Zealand.

On the Board’s behalf, the Audit and Risk Committee monitors the financial and risk management of ENZ.

The Human Resources/Organisation Development Committee assists the Board in fulfilling its responsibilities regarding human resources and organisational development policies and practices.

Several special advisers to the Board help guide and shape the Board’s work and ensure connections with the strategic direction of other agencies. The special advisers are:

- the Chief Executive of the Ministry of Education
- the Chief Executive of the Ministry of Foreign Affairs and Trade
- the Chief Executive of the New Zealand Qualifications Authority
- the Deputy Chief Executive Labour, Science and Enterprise from the Ministry of Business, Innovation and Employment
- the Deputy Chief Executive Immigration New Zealand from the Ministry of Business, Innovation and Employment



Diagram 1: Governance of ENZ

GOVERNMENT PRIORITIES

The Government's main priorities

We support the Government's goals for sustainable economic development and education that equips students for the 21st century. International education plays a key role in building the human and social capital that will lead to improved wellbeing and higher living standards for New Zealanders.

International education supports the Government's vision for a high-quality, fair and inclusive education system that provides all New Zealanders with learning opportunities and prepares them for the future². It does so by enabling students to access specific expertise and learning experiences, and to engage with people from diverse backgrounds and viewpoints. These learning experiences help to develop the knowledge, attitude and skills required for responsible and active global citizenship in our connected and complex world.

International education is one of New Zealand's most valuable exports. Our focus on value over volume supports the Government's goal of sustainable economic development. Our work with the regions aims to ensure that all of New Zealand accrues the widest possible benefits from international education.

We support the responsible management of the Government's finances by ensuring we deliver our work programme efficiently and effectively, and by delivering value for money.

² <https://www.education.govt.nz/ministry-of-education/information-releases/education-portfolio-work-programme/>

New Zealand's international education

International Education Strategy to 2030³

The Government will launch a new International Education Strategy in 2018/19 to ensure 'A thriving and globally connected New Zealand through world-class international education'. This new strategic direction and activity will be guided by the following goals:

- **Delivering excellent education and student experience** – ensuring that international students are made welcome, safe and receive a high-quality education in New Zealand.
- **Achieving sustainable growth** – maintaining a diverse, high-value and high-quality international education sector that shares its benefits across all of New Zealand.
- **Developing global citizens** – strengthening New Zealand's connections with the rest of the world, and developing the skills students need to live, work and learn in the wider world.

The development of the strategy was co-led by ENZ and the Ministry of Education, in partnership with the Ministry of Business, Innovation and Employment, the New Zealand Qualifications Authority, Tertiary Education Commission and the Ministry of Foreign Affairs and Trade.

We have aligned our strategic themes with the new International Education Strategy to show the contribution we intend to make towards achieving each of the overarching goals.

³ This Statement of Intent includes calendar year and financial year information. A calendar year is shown as a single year, such as 2018, while dates such as 2018/19 refer to a financial year.



New Zealand's education system

The 2016 Performance Improvement Framework review endorsed our foundation approach to our establishment and acknowledged that ENZ has become the New Zealand expert in international education. Over the next four years, we will continue to deliver education providers and businesses, other government agencies and decision-makers with authoritative, targeted information and intelligence that gives New Zealand a competitive edge and provides a strategic influence on the government's agenda for international education.

Education System Stewardship

ENZ is one of New Zealand's education agencies that have the stewardship of New Zealand's education system. Over the next three years we will engage with the other education agencies on the Education Portfolio Work Programme, contributing our specialist insight and expertise in international education.

Tertiary Education Strategy

The Tertiary Education Strategy 2014-2019 outlines six strategic priorities that support the shared outcomes for the New Zealand education system. We work with New Zealand's other education agencies and with tertiary education providers to realise the strategic priority of 'Growing international linkages', and to support the priority of 'Strengthening research-based institutions'. We do this by providing support to tertiary education providers to build their international capability, and by assisting tertiary education providers to promote student mobility.

In 2018/19, we will contribute to the review of the Tertiary Education Strategy to ensure that tertiary education continues to benefit from the international connections, shared knowledge, and enhanced teaching and research that international education brings.

OUR OPERATING ENVIRONMENT

International education in New Zealand

Student mobility

International students studying with New Zealand providers

In 2017, 125,392⁴ international students were enrolled with a New Zealand education provider, a 5% decrease on the previous year. The overall decrease in international student enrolments in 2017 was driven by a 26% decrease in the unfunded PTE sector and a 17% decrease in the funded PTE sector. This was partially offset by increases in the school (+9%) and university (+7%) sectors. International student enrolments at ITPs decreased by 1% between 2016 and 2017.

New Zealanders studying offshore

In 2016, 4.3% of New Zealand university students undertook a period of study overseas⁵. We will work with other government agencies, such as the Ministry of Education, and with education providers to help create an environment that encourages more New Zealanders to take up international study opportunities and develop their international capabilities.

We administer the Prime Minister’s Scholarships for Asia and the Prime Minister’s Scholarships for Latin America, which enable New Zealanders to enhance their international skills through a period of study in those regions. In 2016/17, we funded Prime Minister’s scholarships for 377 New Zealand students.

The value of the industry

The estimated 2017 value of international education in New Zealand is \$4.4 billion.⁶

This makes international education New Zealand’s fifth most valuable export after logs, wood and wood articles (worth \$4.7 billion)⁷. The industry’s value includes both international student attraction and education delivery offshore.

In 2016, the average economic value per international student was \$32,100, a 26%

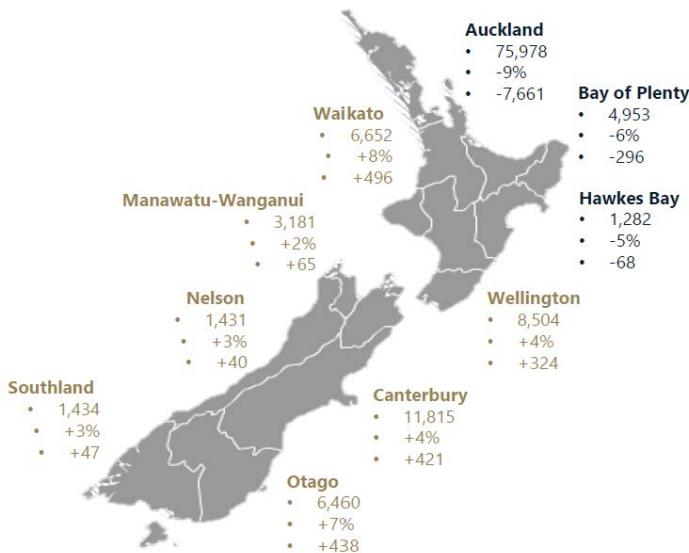


Figure 2: Regional distribution of international students 2017

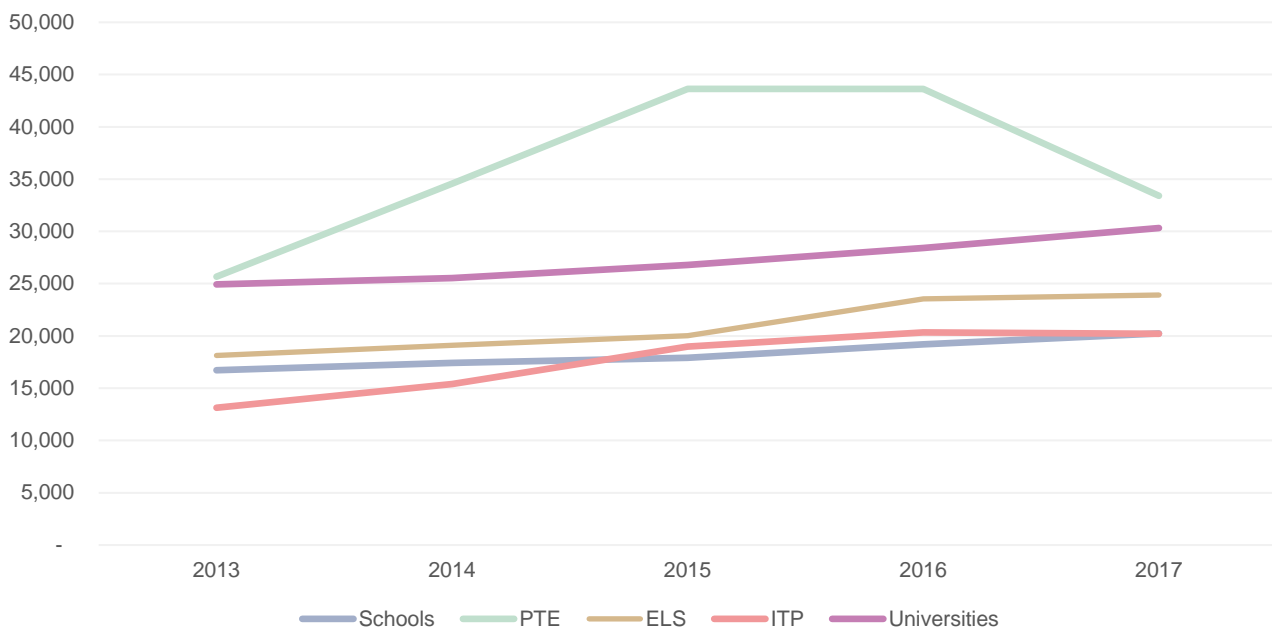
⁴Export Education Levy and Tertiary Single Data Return, Ministry of Education.

⁵New Zealand International Education Benchmark, September 2017.

⁶ 2017 International Student Enrolment Summary – as at 31 August 2017.

⁷ <https://www.stats.govt.nz/news/exports-and-imports-hit-new-highs-in-2017>

New Zealand international student enrolments by sector



increase from the \$25,540 per international student in 2014. We continue to focus on sustainable growth in the average economic value per international student.

Detailed intelligence and insight on international education in New Zealand can be found on ENZ's intelligence portal, [IntelliLab](#).

The wider New Zealand environment

Influencing policy development and change

New Zealand's policy environment for international education is complex. It affects not only student mobility flows to and from New Zealand, but also the attractiveness of the sector to new education providers and businesses.

Immigration and education policy settings, both during and after study, and the recognition of New Zealand qualifications internationally, affect New Zealand's attractiveness to potential international students. At the same time, policy settings need to deliver the best overall outcomes for

New Zealand. We will use our experience and market insight to inform policy settings and practices that affect international education.

We will work closely with the Ministry of Education, the New Zealand Qualifications Authority, the Ministry of Business, Innovation and Employment, and other agencies to influence policies that affect students' and education providers' decision making, and to reduce barriers to sustainable development of international education.

Telling the international education story in New Zealand

Many New Zealanders are unaware of the benefits of international education for New Zealand students and communities. Students studying outside their own country increase international connections between countries by building lifelong friendships and networks, and strengthen their understanding of other cultures. We will continue to build New Zealanders' awareness of the value of international education across New Zealand.

The international environment

There are currently an estimated 5 million globally mobile students. By 2025, this is expected to increase by between 40 and 60%, to 7–8 million. The number of internationally mobile students is driven by a range of demographic, economic, social and cultural factors. The most important of these factors is growth in the number of people aged 18-25 who belong to the global middle class and come from countries without sufficient education infrastructure to support their aspirations.

International education is thriving

Over the past five years, the rapidly growing number of people with the motivation and resources to participate in higher education created unprecedented demand that far exceeds the supply of quality places available globally. International education in New Zealand and other countries with strong education infrastructure is currently thriving because of this growth in student mobility.

Demand will decrease beyond 2025

Our current projections suggest global demand will continue to drive growth in international education for the next 7-10 years, but beyond this, significant challenges are emerging. These include the changing demographics of major markets such as China and India, and rapid growth in supply of quality education from both traditional and non-traditional competitor countries.

From around 2025, the youth population in many countries that have historically been important student markets will begin to decline, while at the same time some traditional markets will have become major study destinations in their own right.

Competition is intensifying

New Zealand has traditionally regarded Australia, Canada, the United Kingdom and the United States as its competitors in

international education. These countries will continue to be major competitors because they offer similar opportunities and benefits as New Zealand, and typically have greater resources for attracting international students.

However, as more countries recognise and value the social and economic contribution that international education brings, there has been rapid growth in quality education supply from both traditional and non-traditional competitors. This includes an increase in English-taught courses in non-English speaking countries in Asia and Europe.

With intensifying competition for international students, New Zealand needs to remain competitive and compare favourably with its competitor countries in terms of education quality, cost and ease of access.

Changing the way education services are delivered

Globally, education is a rapidly changing field with increasingly flexible programmes and modes of delivery. This creates opportunities and risks for New Zealand's international education sector as learners at all levels demand greater flexibility and education choice.

International education in New Zealand primarily involves fee-paying international students attending 'bricks and mortar' institutions in New Zealand and we expect this to continue over the next four years. However, in the longer term, sustainable growth will depend on how well education providers adapt to changes in education demand, and in particular, how well they can deliver education services to the doorstep of their international students through various forms of transnational education (TNE).



OUR OUTCOMES FRAMEWORK

Our outcome ‘New Zealand international education activities provide enhanced social, cultural and economic benefits’ contributes to the Government’s goals of sustainable economic development and education that equips students for the 21st century. Together with government agencies and international education partners, we are working to ensure the benefits of international education are shared across New Zealand.

The diagram on the next page sets out our medium-term strategy. It provides an overview of what we will do towards achieving our outcome and how we will measure the impact of what we do.

To ensure New Zealand benefits from international education now and in the future, we will lead the international education industry in thinking and implementation by:

- taking a future focus to identify the opportunities and competencies required for international education to thrive in the long-term
- taking a strategic focus to influence and drive policy alignment across regulatory agencies
- providing intelligence and insight that enables education providers, other government agencies, stakeholders and ENZ to make better informed decisions.

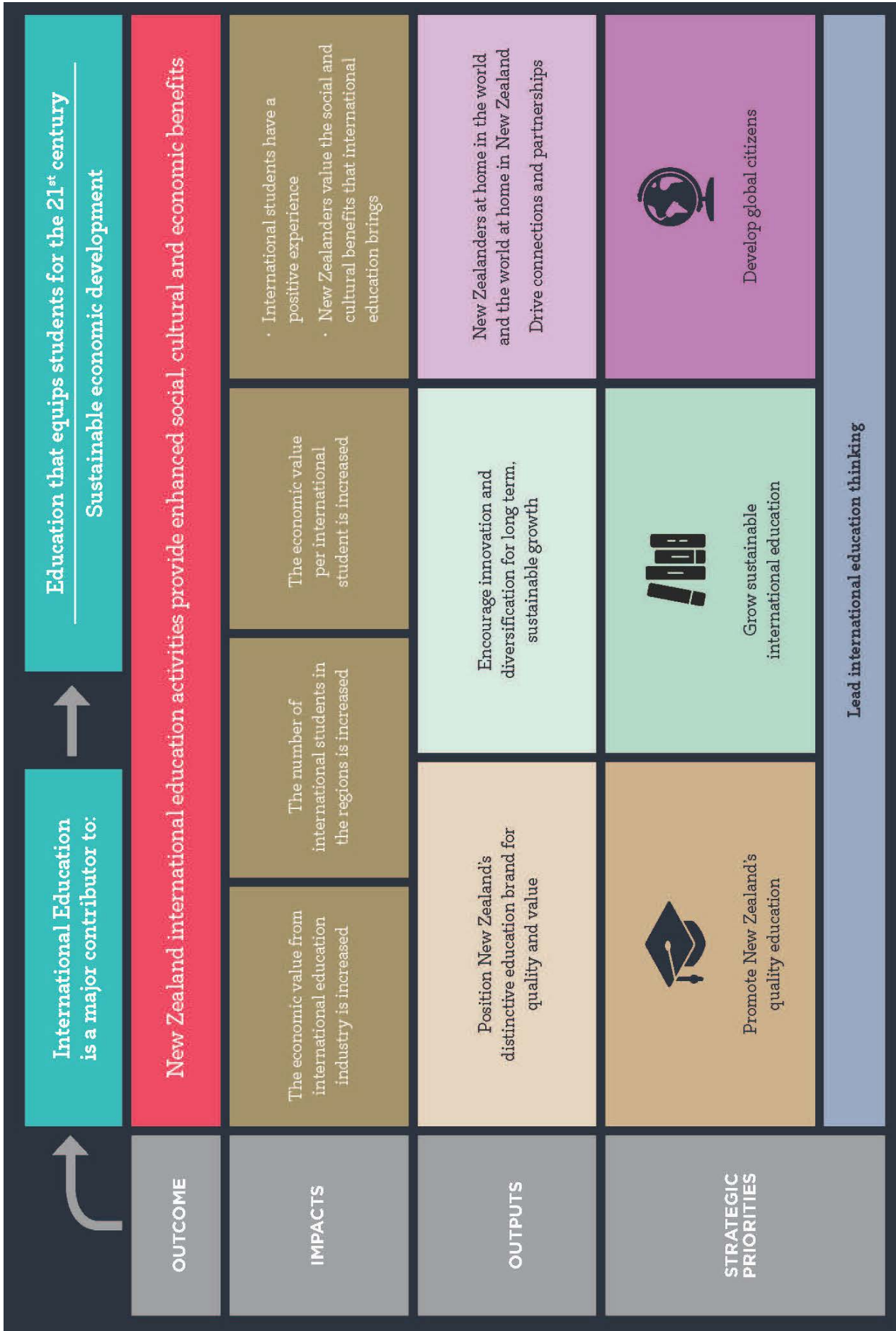
Positioning New Zealand’s distinctive education brand for quality and value will

grow awareness of New Zealand and attract high-quality students. We will capture the hearts and minds of international students and their families by delivering consistent story-telling around New Zealand’s distinctive education experience.

Encouraging innovation and diversification will ensure the long-term, sustainable growth of international education. We will continue our work to diversify New Zealand’s student attraction markets, and the variety of programmes international students come to New Zealand to study. We will also continue to focus on diversifying where international students study in New Zealand to enable a more even distribution of the benefits of international education.

Encouraging New Zealanders to spend time studying overseas and making international students welcome in New Zealand will contribute to the development of global citizens. We will support activities that enable New Zealanders to share their ideas, culture and knowledge with the world, building international connections and capabilities.

We will also work to continuously improve our own insight, expertise and ability to work with students, education providers, other government agencies and stakeholders to increase the benefits of international education to New Zealand, and ensure we have the right platforms and tools to do so.





OUR OPERATING INTENTIONS

Our outcome: New Zealand international education activities provide enhanced social, cultural and economic benefits

What will we do to achieve this?

In order to achieve our intended outcome, and our four-year excellence horizon, we have identified four strategic priorities that shape our activities as the 'go to' agency for international education.

Lead international education in thinking

We will lead the future thinking of the industry and collaborate with other agencies to give effect to the government's goals for international education. This will then drive the activities undertaken by ENZ and other agencies to support sustainable growth of the sector.

Inform and influence government agencies in support of international education

We will collaborate closely with other agencies to create an environment in which international students receive a consistently high-quality education and a positive student experience in New Zealand. We will work to ensure that the social, cultural and economic benefits of international education are understood and shared across New Zealand.

We will take a strategic focus to influence policy alignment across regulatory agencies in support of international education.

We will operate as NZ Inc offshore, working interactively with other New Zealand agencies and supporting each other's activities to promote New Zealand.

We will work with the Ministry of Education and the Ministry of Foreign Affairs and Trade in the area of international diplomacy, and in particular, leadership of NZ Inc efforts offshore to advance educational opportunities, the promotion of education internationally and the use of diplomatic activities such as Free Trade Agreement negotiations.

Lead information and intelligence provision

We will continue to develop international education information and intelligence that meets the needs of education providers, businesses and government, and which gives New Zealand a competitive edge.

In 2016/17 we launched an online intelligence hub for use by education providers and other agencies. We will continue to develop and refine our intelligence and insight so that we lead:

- information and intelligence provision on international education's markets, student experiences and products
- information and intelligence provision on the current state of international education, both in New Zealand and globally
- the future thinking of the industry.



ENZ's 'virtual classroom' at the Thailand Education Fair August 2017

Promote New Zealand's quality education

We will capture the hearts and minds of international students and their families by delivering consistent story-telling around New Zealand's distinctive education experience. This story-telling will reinforce that New Zealand is an open, welcoming country that provides students with a diverse range of rich and rewarding education experiences to prepare them for the future.

Promote the New Zealand education brand

We will use an updated 'Think New' brand strategy to position New Zealand's distinctive and high-quality education offering. We will communicate this quality education message to high-value potential students across a range of channels, with the goal of raising their awareness and preference for New Zealand.

We will deliver integrated digital advertising, social media and public relations campaigns in ENZ's priority markets. These campaigns will focus on student attraction across priority sectors within each market, combining our global brand messages with country-specific content. All our activity will encourage students to visit our student attraction website www.studyinnewzealand.govt.nz. This website directs enquiries and interest from potential international students and their families through to institutions and agents.

We will continue to evolve our database marketing programme to ensure we capture details of high-quality student and parent prospects across our website and other channels. We will then engage and convert these prospects through the MyStudyNZ matching service and ongoing communications, tailored to their preferences and study interests.

Our database marketing programme will also be used to give us insight into which channels are delivering the strongest engagement and conversion to study in New Zealand. These insights will be used to inform our channel strategy for 2018/19 and beyond.

Education agents will be integrated into all of our marketing activity. A new agent training platform will ensure agents deliver our brand story, the unique benefits of a New Zealand education, key messages about our regional strengths, and set clear and realistic expectations for a satisfying student experience. A revamped Education New Zealand Recognised Agents (ENZRA) programme will ensure ENZ and education providers have access to strategic agent partners around the world who are champions for a New Zealand education.

All our attraction marketing activity will be integrated with our overall student journey strategy. We will ensure our brand promise is supported through our student experience initiatives. We will work with current and former international students to foster their

advocacy for a New Zealand education and recruit them to provide authentic story-telling to others about their New Zealand education experience.

We will encourage education providers to use our brand activity, marketing campaigns and the New Zealand Story as support for their own promotional activity. We provide marketing support to the sector by providing the ‘Think New’ brand and ENZ’s [Brand Lab](#) marketing toolkit for use in promotional activities. These tools are targeted at providers seeking to attract international students to New Zealand, and deliver education services offshore.

ENZ will also deliver other promotional activities in specific markets, including:

- search engine marketing
- social media
- education agent seminars
- media and education familiarisation visits to New Zealand
- public relations
- education fairs

Impact: The economic value from the international education sector is increased.

Indicators of success:

The economic value⁸ from New Zealand’s international education sector.

Actual 2016	Target 2018	Target 2020	Target 2022
\$4.47b ⁹	\$4.6b	Increase	Increase

The percentage of prospective students in priority markets who rank New Zealand in the top three preferred countries¹⁰.

Actual 2016/17	Target 2021/22
13%	Increase

⁸ ENZ commissions a full economic value analysis (EVA) of the international education sector biennially. In alternate years, ENZ reports an estimated industry value based on the most recent EVA and current year student enrolment figures.

⁹ Education New Zealand: *New Zealand International Education Snapshot – 2016 Full Year*.

¹⁰ ENZ measures the preference of prospective students in priority markets as part of its regular brand monitoring activity. ENZ reports the result annually, although the target is focused on an increasing trend over a four-year period.

Grow sustainable international education

Drive diversification

Diversification of markets and products remains a priority. ENZ will continue to develop an evidence-based approach to investment in global promotional activities, whereby the mix of investment between globally focused digital marketing campaigns and in-country market activities is informed by the effectiveness of promotional channels in each market.

ENZ's investment in destination marketing and promotion will continue to be underpinned by our annual activity planning process. We will regularly review and prioritise markets to ensure we continue to maximise the benefit for New Zealand, and ensure we have the agility to take advantage of emerging opportunities.

Continue regional diversification within New Zealand

New Zealand's regions are well placed to offer rich and diverse experiences and opportunities to international students and we will actively promote their distinctive education offerings. We want to ensure that all of New Zealand accrues the widest possible benefits from international education.

We will continue to work with education providers, local government/regional economic development agencies and communities to support and encourage the growth of international education and its contribution to business and economic growth in the regions.

Support for regions will be based on a partnership approach and will vary based on growth potential, local capability, and potential for impact as an enabler for economic growth. Activities will include:

- sharing of best practice in international education across education sectors within the region(s)
- supporting capability building and increasing co-ordination for international education providers within the region(s)
- identifying and working to remove regional barriers and constraints to growth in international education
- support for high-impact investment projects.

The activities will be designed to:

- increase awareness of the importance of international education on a regional basis
- support specific growth initiatives appropriate to that region.

Support industry development

We will undertake activities to continue to build the international education sector's capability. The activities will evolve to reflect ENZ's value proposition and feedback from our annual industry survey. Activities may include:

- developing and providing tools for use by the sector¹¹
- organising seminars, conferences or professional development for the international education sector, or a specific subsector
- providing co-funding for international education projects
- supporting regional providers and agencies to develop their own distinctive education stories and student experience programmes.

¹¹ [IntelliLab](#), [Skills Lab](#), [The Brand Lab](#)

Understand international education capacity and capability

We will develop a more in-depth understanding of the capacity and capability for international education in New Zealand so that we can identify both the opportunities for, and the barriers to, sustainable growth. We will encourage providers to collaborate with partners so they can benefit from opportunities that exceed the capacity or capability of a single provider.

We will also continue to work with the education sector to identify and develop opportunities for education delivery offshore. Most of the offshore activities undertaken by education providers are project based and not

necessarily linked to a specific location. We envisage our support will vary from project to project, and may include:

- providing market intelligence
- providing advice on the steps involved in exploring a potential opportunity
- supporting a delegation visit to explore opportunities in a market
- helping a New Zealand provider to undertake due diligence of a proposed deal
- providing support to investigate a potential new market.

We will work with other New Zealand government agencies to promote government to government relationships that support international collaboration and partnerships.

Impact: The number of international students in regions¹² is increased.

Indicator of success:

The number of international students enrolled to study outside Auckland.

Actual 2016	Actual 2017	Target 2018	Target 2019	Target 2020	Target 2021
49,133 ¹³	50,690 ¹⁴	Increase	Increase	Increase	Increase

Impact: The economic value per international student increased.

Indicator of success:

The economic value per international student¹⁵.

Actual 2016	Target 2018	Target 2020	Target 2022
\$32,100	Increase	Increase	Increase

¹² All of New Zealand, excluding Auckland.

¹³ Education New Zealand: *New Zealand International Student Enrolments – 2016 Full Year*.

¹⁴ Education New Zealand: *New Zealand International Student Enrolments – 2017 Full Year* (provisional).

¹⁵ Calculated by dividing the total economic value (from the biennial EVA) by the number of international student enrolments.



Develop global citizens

International education brings people together from all parts of the globe to share ideas, skills and knowledge, and in doing so creates enduring friendships. International education enables New Zealanders to feel at home in the world, and the world to feel at home in New Zealand.

Support student experience and wellbeing

Placing students at the centre of our approach is vital if we are to stay abreast of current and future needs and trends, and ensure New Zealand continues to present an attractive, compelling proposition to internationally mobile learners.

In 2017/18, we developed a student journey strategy and over the next four years we will continue to bring the international student experience and student voice into key decision-making to ensure consistent standards of high-quality education, pastoral care and living experience are the mark of international education in New Zealand.

We will develop a Student Experience digital platform to provide consistent, relevant and accessible information for international students, via a single trusted source. It will serve as a 'one-stop shop' for content from NZ Inc partners and other organisations, tailored for an international student audience.

We will continue to work with education providers, student groups, government agencies, local government and community groups to ensure the overall student experience – from recruitment through to advocacy activities after graduation – builds on New Zealand's positive and distinctive brand of education.

We will collect feedback from international students to ensure that their expectations are met.

Telling the story

International education needs to operate with an accepted social licence in New Zealand. This will help New Zealand maintain a reputation for being a welcoming place for international students.

We will broaden understanding of the value of international education by New Zealanders, particularly the social, cultural and economic benefits. To do this we will continue to tell the international education story and improve our understanding of New Zealanders' perceptions of international education.

We will develop and launch a digital media centre that showcases the breadth and quality of international education in New Zealand. This will help both telling the story within New Zealand, and in supporting ENZ's in-country and other digital activities to promote New Zealand's education internationally.

Administer scholarship programmes for New Zealanders

We will help New Zealand students build life-long friendships and networks in Asia and Latin America by administering the Prime Minister’s Scholarships for Asia and the Prime Minister’s Scholarships for Latin America. These scholarships enable New Zealanders to enhance their skills through study offshore across a wide range of courses and international locations.

The presence of skilled New Zealanders studying internationally also helps to establish

and maintain links between academic institutions, promote the high quality of the New Zealand education system and encourages student mobility.

Administer scholarships for international students

We will administer the New Zealand International Doctoral Research Scholarships that fund top international students to come to New Zealand to undertake PhD study.

Impact: International students have a positive experience.

Indicator of success:

The proportion of international students who were satisfied or very satisfied with their overall experience¹⁶.

Target 2017/18	Target 2018/19	Target 2019/20	Target 2020/21	Target 2021/22
Revised measure	≥ 85%	88-95%	88-95%	88-95%

Impact: New Zealanders value the social and cultural benefits that international education brings.

Indicator of success:

Awareness of the contribution of international education to New Zealand¹⁷.

Actual 2016/17	Target 2021/22
56% ¹⁸	Increase

¹⁶ Measured by surveying international students. This measure applies to any sectors surveyed in 2018/19 as not all sectors are surveyed every year. Recent sector results are published in Education New Zealand’s [Annual Reports](#).

¹⁷ ENZ commissions research (including both qualitative and quantitative approaches) to identify New Zealanders’ perceptions of international education. The target is focused on an increasing trend over a four-year period.

¹⁸ Percentage of research participants who endorse or support international education.

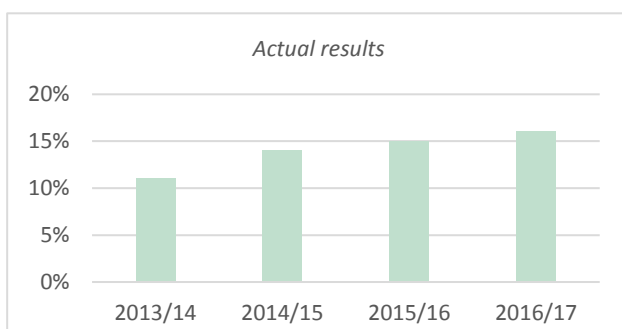
OUR ORGANISATIONAL DEVELOPMENT

ENZ's current capabilities, systems and processes position us well to make a significant contribution towards New Zealand's international education goals. Since our 2016 Performance Improvement Framework review we have strengthened our intelligence and insight capabilities and our understanding of international students' expectations, preferences and experiences.

We will ensure our organisational development activities are well aligned with our long-term strategy and support the efficient and effective delivery of our activities. Some of the activities we will deliver over the next four years require new skills, platforms or tools. We will address these gaps to ensure we can deliver on our long-term strategy.

We will work within the spirit of the whole-of-government directions for procurement, information and communications technology (ICT) and property to ensure we have efficient and effective back-office services. We will measure our efficiency and effectiveness by monitoring the ratio of administration expenses to core operating expenses.

Measure	Target 2018-2022
Ratio of administration expenses to core operating expenses.	13-18%.



Our people

Our values create the foundation for ENZ and support the 'Think New' brand we use to promote international education. They are:

- Think Bold
- Think Open
- Think Team

We will continue to develop our approach to ensure we have a global team with the flexibility and agility to ensure ENZ is fit for purpose. This includes ensuring we have people with the appropriate capabilities in the right locations to deliver on the organisational demands highlighted in ENZ's PIF review.

We evolve our People Strategy to ensure it is appropriate to the needs and business model of ENZ. The key elements of the current Strategy are:

1. planning and resourcing
2. employee engagement and performance improvement
3. developing our people
4. recognising and rewarding our people.

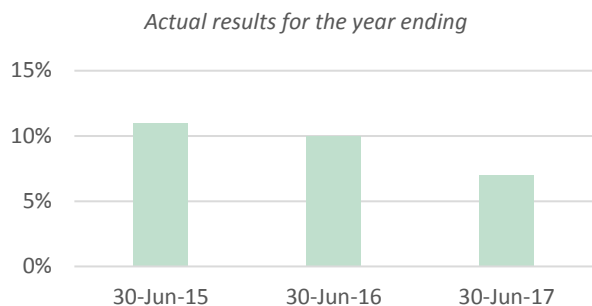
We will lead staff engagement initiatives to improve staff wellbeing and ENZ's productivity.

As most of our work is project based, we will also build a flexible resourcing model to enhance our speed and agility.

Our organisational performance measures are reflected in individual performance agreements.

Measure	Target 2018-2022
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Core unplanned turnover. < 11%.



Good employer matters

We recognise the need for a diverse workforce to effectively deliver services to our stakeholders. We provide equal employment opportunities to make the most of the talents of all of our people.

Our status as a good employer will be assessed against the elements and criteria set out by the Human Rights Commission. Over the next four years we will continue to ensure that all elements are in place and working well through our People Strategy.

We will continue to run an employee engagement survey. We will develop and implement solutions for areas of improvement identified through the survey.

Measure	Target 2018-2022
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Employee engagement Top quartile of the staff engagement performance index for the public sector.

Actual results

2014/15: In the top quartile of government agencies that complete the same survey.

2015/16: The survey launch was postponed until the first quarter of 2016/17.

2016/17: In the top quartile of the staff engagement performance index for the public sector.

Our technology

We will continue to implement our roadmap for ICT. Successful implementation of the roadmap for ENZ will mean that ENZ is ‘business led, technology enabled’.

Technology underpins the delivery of our services globally. Establishing and then leveraging off an appropriate ICT platform is key to ENZ being able to achieve its goals. We have the infrastructure in place to be a globally connected and communicating organisation, including global data connections, document management system and customer relationship management system. These support the sharing of information and knowledge and encourage collaboration, particularly between ENZ’s onshore and offshore staff.

During 2018/19 we will continue to develop our digital platforms and support services as part of our data driven, digital approach to global marketing and promotion. This is intended to create a seamless international student journey from registering interest through to graduation and post-study.

Our expertise

As part of our move towards an investment model, we will redevelop the investment approach underlying the Country Activity Plan process to drive greater market, product and regional diversification. This supports our move towards an investment model where we allocate our resources to achieve maximum impact for a given level of risk. We will use data and in-market intelligence to continually review and refine our business activities, and to inform our decisions about future investment. This will enable us to predict with greater accuracy and certainty the activities that will result in the greatest possible return on our investment.

Measure	Target 2018-2022
Identify and actively manage a targeted portfolio of markets that drives current opportunities and creates future market positions:	
<ul style="list-style-type: none"> Country Activity Plans (CAPs) document business activity and investment for each 'promote' and 'explore' market 	100%
<ul style="list-style-type: none"> Country team reviews completed three times per year. 	100%

Our systems and processes

Capital and asset management intentions

The value of our capital assets is minor. The table below summarises the forecast value of our assets at 30 June 2018.

\$000	Forecast net book value at 30 June 2018	Comment on assets forecast at 30 June 2018	Forecast 2018/19	Forecast 2019/20	Forecast 2020/21	Forecast 2021/22
Furniture and office equipment	65	Lifecycle replacement only	35	35	35	35
Computer hardware and Intangible assets	321	Lifecycle replacement of desktop computer hardware and a continued move to the cloud and 'as a service' model	100	100	100	100
Motor vehicles	25	Motor vehicle in Beijing only	-	-	-	-
Leasehold improvements and make-good	137	Lambton Quay office fit-out completed in 2015	30	30	30	30

Our capital investment intentions over the next four years are that we will:

- Replace furniture and office equipment at the end of its useful life
- Replace desktop computer hardware at the end of its useful life and we will continue to develop intangible assets, however in line with our ICT strategy we intend to shift our data to the public cloud and purchase ICT infrastructure, platforms and software 'as a service'
- Reduce ownership of vehicles and lease them instead which is a more flexible approach as part of the changing needs of market development and growth

- Periodically review our office accommodation in response to the changing needs highlighted above and contribute toward office refits as necessary. Our Lambton Quay lease expires August 2020, with an option to extend for a further six years

We now have in place the infrastructure and platforms required to be a globally connected and communicating organisation, including new global data connections, video conferencing solution, a document management system and customer relationship management system. This has seen an improvement in data and personal interaction across the organisation.

Risk management strategy

ENZ has a risk management and reporting framework that provides a consistent way to identify and assess the most important risks.

We will:

- monitor the risks regularly through the Audit and Risk Committee

- revise, where necessary, the consequence and likelihood levels for any risk
- report any significant risks, and appropriate strategies to address them, to our Minister and our monitoring agencies as they arise.

We have identified ENZ’s broad risks and mitigation strategies¹⁹.

Risk	ENZ’s mitigation strategies
<p><i>New Zealand’s international education goals</i></p> <p>Failure to deliver on the Government’s goals for international education.</p>	<ul style="list-style-type: none"> • Support the implementation of the New Zealand International Education Strategy. • Work with the international education sector to gain their support of the Government’s goals and ENZ’s work. • Undertake robust strategic and business planning, including prioritising activities and setting clear goals. • Monitor our progress towards our goals, including undertaking regular reporting against our plans.
<p><i>New Zealand’s international education brand</i></p> <p>Failure to build and maintain the reputation of New Zealand’s international education industry.</p>	<ul style="list-style-type: none"> • Continue to position the Think New education brand to create compelling reasons to study in New Zealand and promote New Zealand as a world-class and high-value destination. • Develop and launch a digital media centre to promote New Zealand’s quality education. • Work with other New Zealand education agencies to ensure international students are satisfied with their experience in New Zealand. • Work with the international education sector to strengthen their capability in promoting and delivering New Zealand’s international education products and services.
<p><i>Changes to the global environment</i></p> <p>Changes to external factors that reduce the attractiveness of New Zealand’s international education sector.</p>	<ul style="list-style-type: none"> • Promote New Zealand as a world-class and high-quality destination. • Continue market diversification of New Zealand’s international student attraction markets and pivot between markets as appropriate. • Monitor competitor countries’ policies, practices and targets for international education.
<p><i>Changes to the global education environment</i></p> <p>Changes to the way education is delivered globally.</p>	<ul style="list-style-type: none"> • Work with the sector and Ministry of Education to identify changes and trends likely to affect international education, including changes being made by New Zealand’s competitor countries. • Build sector capability to respond to change. • Use existing digital assets and develop new digital assets to showcase New Zealand’s offshore education and training offerings. • Develop and implement a product innovation incubator.

¹⁹ Current proposed changes to Government settings have the potential to change the risks and mitigations.

Risk	ENZ's mitigation strategies
<p><i>New Zealand government policy settings</i></p> <p>Government policy settings that reduce New Zealand's attractiveness to potential students.</p>	<ul style="list-style-type: none"> • Continue to position the Think New education brand to create compelling reasons to study in New Zealand and promote New Zealand as a world-class and high-value destination. • Influence policy settings and ensure agencies understand the potential implications of policy settings via the International Education Agencies group. • Lead the provision of intelligence and information to drive policy settings.
<p><i>ENZ's reputation</i></p> <p>Lack of trust in ENZ by the international education sector or other government agencies.</p>	<ul style="list-style-type: none"> • Maintain a clear understanding of the sector's needs. • Ensure the sector understands ENZ's role and long-term strategy. • Monitor the quality of the products and services we deliver to the sector, and whether they meet the sector's needs.
<p><i>ENZ's organisational development</i></p> <p>ENZ lacks the capability or capacity to achieve its long-term goals or deliver its work programme.</p>	<ul style="list-style-type: none"> • Undertake robust strategic and business planning, including prioritising activities and setting clear goals. • Identify our capability and capacity needs and address the gaps to ensure we can effectively and efficiently deliver on our long-term strategy. • Work within the spirit of the whole-of-government directions for procurement, ICT and property.

APPENDIX ONE: OUR STATUTORY FUNCTIONS

ENZ’s functions are specified in section 270 of the Education Act 1989. 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.

APPENDIX TWO: GLOSSARY AND ABBREVIATIONS

ELS	English language school
ENZRA	Education New Zealand Recognised Agent
EVA	Economic value analysis
ITP	Institute of technology and polytechnic
NZ Inc	The collaboration of New Zealand government agencies, particularly when operating offshore
PTE	Private training establishment
Student mobility	Student mobility refers to students moving from their home country to another country (or countries) to study
TNE	Transnational education, which is the provision of education by institutions in one country to students in another country

Education New Zealand

Level 5, 160 Lambton Quay
Lambton House
Wellington 6144

Phone: +64 4 472 0788

Fax: +64 4 471 2828

Industry website: www.enz.govt.nz

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