

Education New Zealand Manapou ki te Ao

Briefing to the Incoming Minister
2 February 2023

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INTRODUCTION

International education delivers significant educational, economic, and social benefits to Aotearoa New Zealand in the short and long-term. But it was one of the sectors hardest hit by the pandemic and subsequent border closures.

International education changes people's lives. It brings people together to share ideas. It builds global skills, knowledge, cultural competencies and creates networks between Aotearoa New Zealand and other countries. It builds connections with and helps to influence other countries to advance Aotearoa New Zealand's interests, project our values and secure the outcomes that matter to Aotearoa New Zealand and our global partners.

International education intersects with many government portfolios, particularly education; economic development; research, science and innovation; immigration; foreign affairs; tourism; and trade and export growth. It is seen as an important component of the Reconnecting with the World initiative as well as the Trade Recovery Strategy.

International education is made up of international and domestic students, academics and staff travelling internationally for study, along with delivering Aotearoa New Zealand's education products, services and approaches offshore. It encompasses different modes of education delivery (face-to-face, online, offshore and blended), research connections and partnerships with offshore institutions, and New Zealanders building their global skills and knowledge in their studies.

Aotearoa New Zealand's international education sector (the sector) is made up of English language schools, private training establishments, schools, Te Pūkenga, universities, wānanga, providers of

education products and services (like education technology companies and education publishers), education agents and government agencies.

In 2019, international education directly contributed \$3.7b to the economy from fees and expenditure by international students, expenditure by visiting family and friends, and education and training exports.¹ Due to the impact of COVID-19 and border closures, Aotearoa New Zealand saw the contribution significantly reduce to \$790m in 2022¹, the closure of some international education providers and other providers reducing their capability and capacity which has affected international education's wider contribution in Aotearoa New Zealand's regions.

The last few years have created many opportunities for businesses that deliver education products and services offshore and online. Aotearoa New Zealand education businesses, such as education technology companies, have been able to benefit from these opportunities.

With the border reopening, international students are now coming to Aotearoa New Zealand to study and New Zealanders are travelling offshore for study. The early signs are promising, but there are still many unknowns that could affect the rebuild of the sector, including our competitors' investments and international education offerings (Australia and Canada) and the emergence of new competitors.

The refreshed *New Zealand International Education Strategy 2022-2030* (NZIES) was released last year to support the rebuild and recovery of the sector in the short-term while focusing international education to deliver high-value benefits to all New Zealanders in the longer term.

¹ Ernst and Young, *Broader Benefits of International Education for New Zealanders – Baseline Valuation*, 2022. The direct financial contribution was calculated using the Computable General Equilibrium (CGE) methodology. This methodology

is more rigorous than previous analyses that used an Input Output methodology and calculated a direct financial contribution of \$5.0 billion. The CGE methodology is an approach increasingly being used within Government.

The NZIES includes the actions that Education New Zealand Manapou ki te Ao (ENZ) will complete to deliver on the government’s goals for international education. ENZ’s activities are focused on:

- rebuild and recovery of the sector through:
 - building preference for and promoting Aotearoa New Zealand education
 - supporting the rebuilding of international education providers² capability and capacity
- delivering an excellent student experience
- ensuring the international education sector rebuild to be sustainable and resilient
- developing global citizens.

ENZ operates under section 511 of the Education and Training Act 2020 and delivers on our Letter of Expectations using our 2022/23 budget of \$35.565m and 2023/24 budget of \$31.765m. To deliver on Focus Area 1 (the rebuild and recovery of the sector) of the NZIES, ENZ’s short-term focus can be encapsulated in:



Preference: driving student and learner preference for Aotearoa New Zealand education



Influence: being the assertive voice of international education within Government



Connection: building global connections and reciprocity in international education

Steve Maharey
Board Chair

and supporting the Government’s broader objectives



Skills: rebuilding sector capability and capacity

ENZ works with the international education sector as well as other government agencies and onshore and offshore to implement the Government’s priorities for international education so that Aotearoa New Zealand benefits. To also deliver on our Letter of Expectations, we work to support Māori-Crown relations in all we do where there are Māori interests or impact.

The Minister of Education has responsibility for ENZ. We look forward to working with you to implement your priorities for international education.

In closing, the story behind Manapou ki te Ao our name is at the heart of ENZ.

Manapou: A fruit stone of reddish or brown colour said to be brought by the Kākā parrot in its crop from Hawaiki as nourishment.

Ki te Ao: The word “Ao” can be translated as “World” and also refers to “The Dawning” which speaks to the idea of New. In Māori cosmogony the idea of Ao signifies dawn, a new beginning every day, new experiences, new opportunity and new learnings.

Together, **Manapou:** Supporting and sustaining life which allows growth and progression.

Ki te Ao: To the world.

Grant McPherson
Chief Executive

² This term is used to describe Aotearoa New Zealand’s English language schools, Te Pūkenga, private training establishments, schools and universities.

THE OPPORTUNITIES AND CHALLENGES

The opportunities

The border has reopened, with international education providers working to attract international students to study in Aotearoa New Zealand. This has been an opportunity to continue to accelerate the move that was being made from volume to value, as international education providers build back their offerings and reconnect with their international markets. In turn, this has created an opportunity to rebuild a sector that has historically delivered significant social, cultural and economic benefits to New Zealand.

Through our offshore footprint and international activities, ENZ facilitates connections to a broad network of partners and stakeholders that contribute to Aotearoa New Zealand’s socio-economic, diplomatic and foreign affairs goals and those of our partners.

ENZ has been working to build prospective students’ and their influencers’ interest,

awareness and preference for Aotearoa New Zealand as an education destination through our activities. International education providers have also been working to attract and to enrol international students.

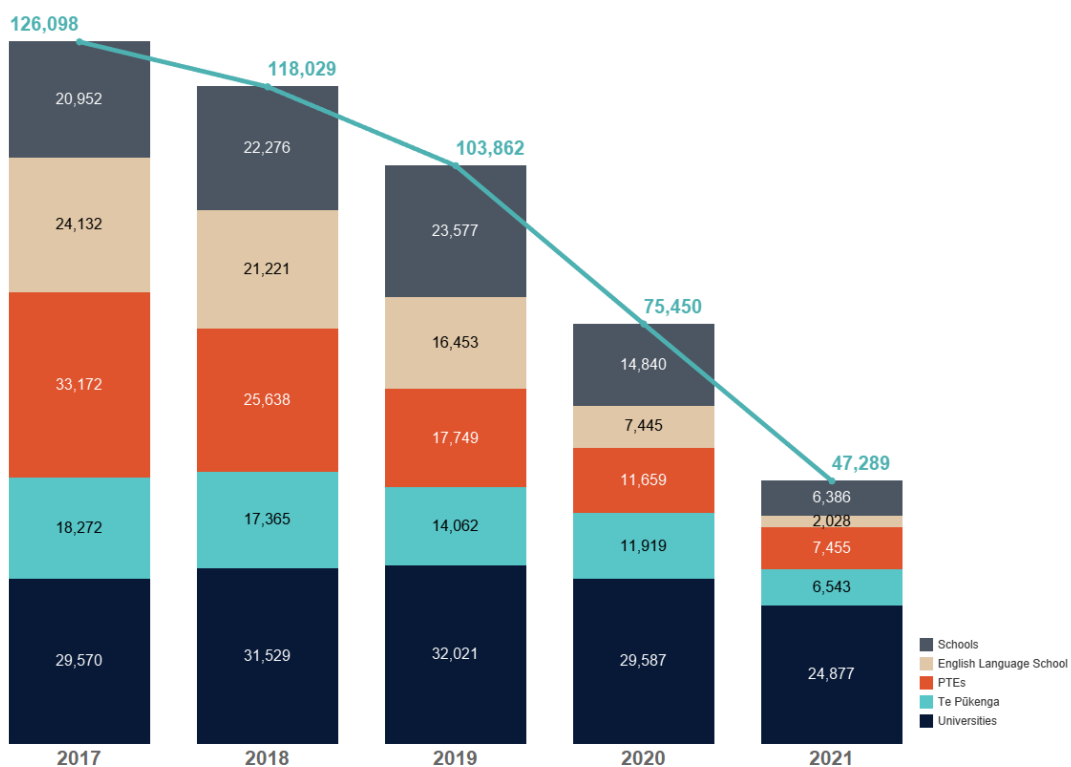
This creates an opportunity to reposition Aotearoa New Zealand as a provider of high-quality education that changes people’s lives through telling the New Zealand education story and working with the sector.

The challenges

International education is intensively competitive. Countries often compete on the attractiveness of their “offering” to international students. Many of Aotearoa New Zealand’s competitors have made their “offering” more attractive through changes to their policy settings. Their changes have included:

- Australia waiving the cost of a further student

Number of international students enrolled with Aotearoa New Zealand providers



visa application where the student couldn't complete their course due to the pandemic³

- Canada temporarily lifting its' 20 hour per week cap on the number of hours that eligible post-secondary students are allowed to work off-campus while class is in session⁴
- Australia allowing qualified international student graduates to stay and work in Australia for an additional two years.⁵

These changes create challenges for Aotearoa New Zealand's international education providers as they seek to rebuild in terms of size and speed.

With the significant reduction in international students in Aotearoa New Zealand since 2020, international education providers have lost some of their capability and capacity to rebuild their student attraction activities and support international students' experiences. Reductions in ENZ's funding and education providers' ability to fund international travel is affecting their ability to promote studying in Aotearoa New Zealand.

Overall, we are seeing positive signs of growth in attracting international students to Aotearoa New Zealand which is reflected in international student visa application numbers. However, international education providers are in the early stages of the rebuild.

International students are concerned about affordability and conscious of the costs incurred by travelling for international education. The cost of living, tuition fee costs, air connectivity and changing exchange rates all feed into these

concerns and impact on the students' decisions of where to study.

Funding changes with the completion of the COVID-19 Response and Recovery Fund and changes in the Export Education Levy⁶ means that our work programme to promote the Aotearoa New Zealand education brand, undertake research and support the sector's capability is affected. While the Export Education Levy has recently been reinstated, in the short-term, it is unlikely that the Levy will mirror pre-pandemic levels.

What the Minister can do to address the opportunities and challenges

ENZ considers that the most impactful short-term activity that you can undertake as Minister, is to travel to Aotearoa New Zealand's two largest student attraction markets (China and India) to support ENZ's and international education provider activities to promote and build a stronger preference for the Aotearoa New Zealand education brand.

In the longer term, you will need to consider the appropriate funding for ENZ to deliver on the goals of the NZIES. ENZ will work with other officials to ensure there is appropriate investment available to accelerate the rebuild of the student attraction focus of the NZIES as well as build a new international education future.

³ <https://www.homeaffairs.gov.au/covid19/visa-information/refunds-and-waivers#:~:text=If%20you%20have%20paid%20for,on%20your%20original%20VAC%20receipt>.

⁴ <https://www.canada.ca/en/immigration-refugees-citizenship/news/2022/10/international-students-to-help-address-canadas-labour-shortage.html>

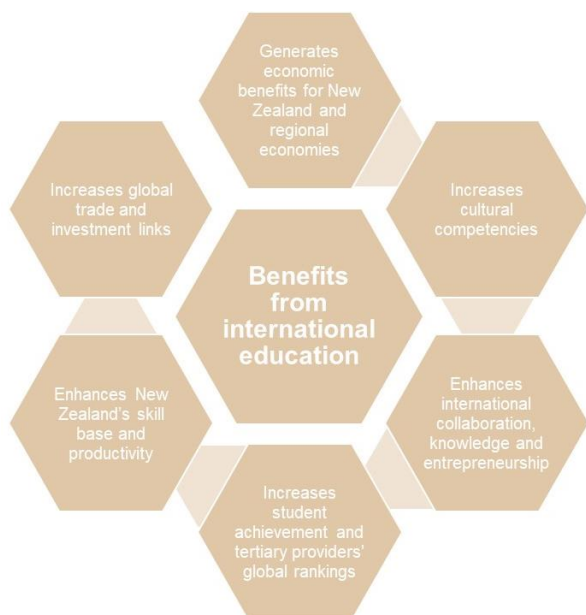
⁵ <https://www.studyaustralia.gov.au/news/post-study-work-rights-extended>

⁶ The Export Education Levy is paid by international education providers based on their international student enrolment numbers.

INTERNATIONAL EDUCATION

The benefits of international education

International education benefits Aotearoa New Zealand educationally, socially, culturally and economically and helps strengthen its relationships with other countries.



In education, it enhances collaboration and builds stronger global connections, research links and partnerships for education providers. International education increases the research output of providers which can, in turn, increase Aotearoa New Zealand tertiary providers' global rankings and reputation. In 2019, 34% of Masters and 50% of Doctorate enrolments were international students, and as such they formed a substantial portion of the future potential pipeline for academic researchers.⁷

For students, an international education experience increases the skills they have and grows their global competencies. It creates global citizens who can study, work and live across

cultural and national boundaries. It brings people together from around the world to share ideas, skills and knowledge, and in doing so creates enduring friendships and connections.

Around 2% of Aotearoa New Zealand tertiary learners studied abroad in 2019.⁸ Possible indirect economic impacts from student exchange programmes⁹ and scholarship placements included increased workforce productivity and increased employment earnings.

A further positive feature of international education is that it provides a unique opportunity for domestic students to develop as global citizens while remaining in Aotearoa New Zealand, over and above the limited number of students who undertake offshore exchange, through connections with international students in their classrooms, lecture theatres and communities.

Relationships created through international education, including alumni networks, support Aotearoa New Zealand's relationships with key trading partners and help develop opportunities for growth in many other sectors for both Aotearoa New Zealand and other countries.

A positive impact from international education comes from the links between international education, migration, trade and bilateral relations. This includes the potential for alumni to:

- foster long-term trade links, via the intercultural skills and experience developed from their Aotearoa New Zealand study. This includes international alumni who leave Aotearoa New Zealand and support trade links as part of offshore businesses.

⁷ Ernst and Young, *Broader Benefits of International Education for New Zealanders – Baseline Valuation, 2022*.

⁸ Data sourced from Organisation for Economic Co-operation and Development,

https://stats.oecd.org/Index.aspx?DataSetCode=EDU_ENR_L_MOBILE

⁹ These are reciprocal programmes providing an opportunity for students to live and study in another country.

- contribute to positive consumer sentiment towards Aotearoa New Zealand in their home country.¹⁰

International education is also an important contributor to Gross Domestic Product (GDP). In 2019, \$3.7b in direct contribution to the economy and around 6,000 in flow-on employment came from fees and expenditure by international students, expenditure by visiting family and friends, and education and training exports. This significantly reduced to \$790m in 2022.¹⁰

Most international students (62%) return to their country of origin after they have completed their studies. A further 13% return home after their post-study work meaning that in total 75% have returned home after three years.

The international students who lived and worked in Aotearoa New Zealand after their study contributed up to an additional \$6 billion in the form of labour supply and productivity to GDP in both 2019 and 2022 over and above the direct financial contribution during their study.¹¹

Overall, through international education, Aotearoa New Zealand builds a strong long-term network of partners and stakeholders that can contribute to the achievement of Aotearoa New Zealand's socio-economic goals while positively influencing our international reputation.

A paper summarising the broader benefits of international education and seeking your agreement to announce the findings of the Ernst and Young report on the broader benefits has been provided to you (ENZ briefing no. 2122-159).

The Government's vision for international education

The [New Zealand International Education Strategy](#) (NZIES) sets out the Government's

vision for international education. This is to build a new future for the sector following the disruption of the pandemic by developing a high-value, resilient and innovative sector for both international and domestic students.

The Strategy's vision is for *a thriving and globally connected New Zealand through world-class international education*. It has two Focus Areas and three overarching goals. The Focus Areas are:

1. **Build and recovery** over the short-term, addressing the immediate need to help providers rebuild student recruitment and onshore delivery following the COVID-19 border closures. This will give us the foundation for Focus Area 2. Activities in this area include promoting international education through, for example diplomatic travel undertaken as part of reconnecting Aotearoa New Zealand with the world.
2. **Building a new future for international education** over the medium to long-term focusing on diversification to build a more resilient international education sector which is less reliant on onshore education delivery.

The overarching goals are:

- **delivering an excellent education and student experience** so that international students receive a high-quality education, feel welcome and safe, and receive an excellent overall international student experience beyond the classroom.
- **ensuring international education is resilient and sustainable** by making sure international education student enrolment is based on quality, attracts students into the regions (also helping to meet skill shortages), and helping international education to flourish through diversification of markets, people flows and innovative products and services.

¹⁰ Ernst and Young, *Broader Benefits of International Education for New Zealanders – Baseline Valuation*, 2022

¹¹ Ernst and Young, *Broader Benefits of International Education for New Zealanders – Baseline Valuation*, 2022. The CGE methodology and NZ Statistics Department IDI data were used to estimate the GDP output and wage

impacts associated with domestically trained international students who remained in Aotearoa New Zealand and transitioned into the domestic workforce in the 10 years leading up to each year - 73,885 and 73,080 international students in 2019 and 2022 respectively.

- **developing global citizens** by helping all students gain the knowledge and skills they need to live, work and learn globally, providing stronger global connections, research links and partnerships, and helping New Zealanders to understand and embrace the benefits of international education.

ENZ is working alongside the Ministry of Education, other agencies and the sector to implement the NZIES and deliver on the Action Plan.

Other portfolios and agencies involved

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

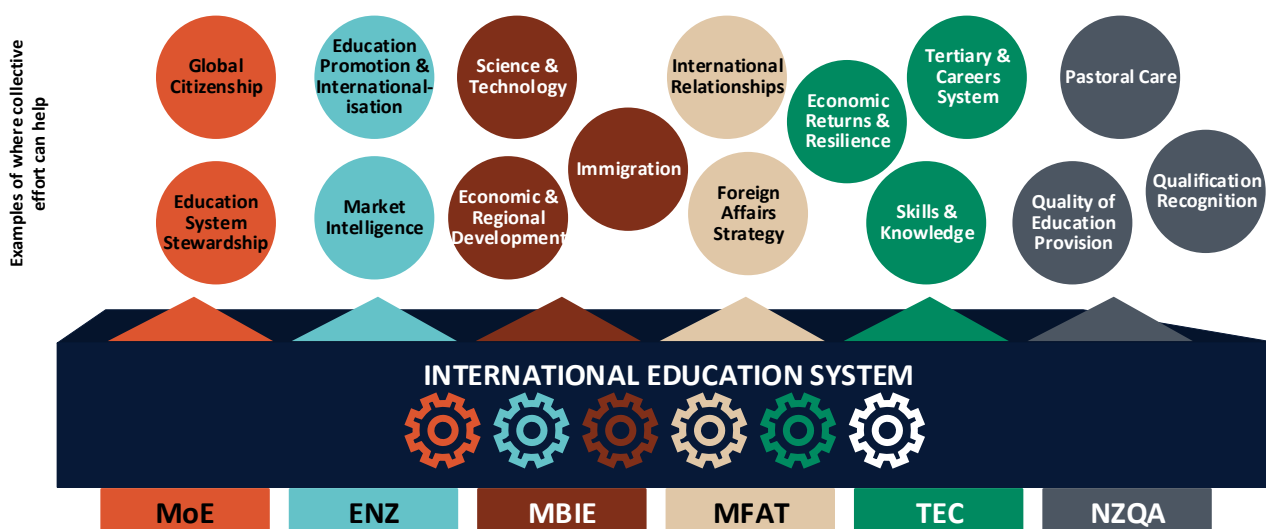
We engage regularly and comprehensively with core partners. They include the Ministry of Education as the primary monitoring agency and education system policy agency, and ENZ’s other

monitoring agency, the Ministry of Business, Innovation and Employment (MBIE). MBIE also has policy responsibility for relevant critical areas including immigration settings and the labour market, with international education providing opportunities to help address Aotearoa New Zealand’s skill shortages.

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

There are other agencies with a stake in international education including the Ministry of Foreign Affairs and Trade (MFAT). Education is a valuable tool for building diplomacy networks and bilateral trade outcomes for Aotearoa New Zealand, as illustrated in the Trade Recovery Strategy¹² where international education contributes to two key areas (“trade and export lift” and “resilience”).

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



¹² <https://www.mfat.govt.nz/en/trade/trade-recovery-strategy/trade-recovery-strategy-2-0/>

ENZ collaborates with other education focused agencies including the New Zealand Qualifications Authority which has responsibilities for the recognition of Aotearoa New Zealand's qualifications offshore and administering the Education (Pastoral Care of Tertiary and International Students) Code of Practice 2021.

There are also trade and international synergies with agencies like Tourism New Zealand and New Zealand Trade and Enterprise, while others such as the Human Rights Commission and the New Zealand Police, help create the environment for international students studying here.



THE OPERATING ENVIRONMENT

Since the pandemic, ENZ and Aotearoa New Zealand's international education sector has embraced the shift from recovery to rebuild. The refreshed NZIES provides a sound basis for ENZ and the sector to rebuild.

The current state of international education

Attracting international students for study onshore

Typically, prospective international students and their parents select the country to study in and then select either the course or international education provider. This means that building interest, awareness and preference for Aotearoa New Zealand as an education destination is important to then enable international education providers to promote themselves and their education offerings.

Overall, the global market for international education is sizeable. In the 2020 academic year, 4.4 million international students were studying in an OECD¹³ country, 70% more than a decade

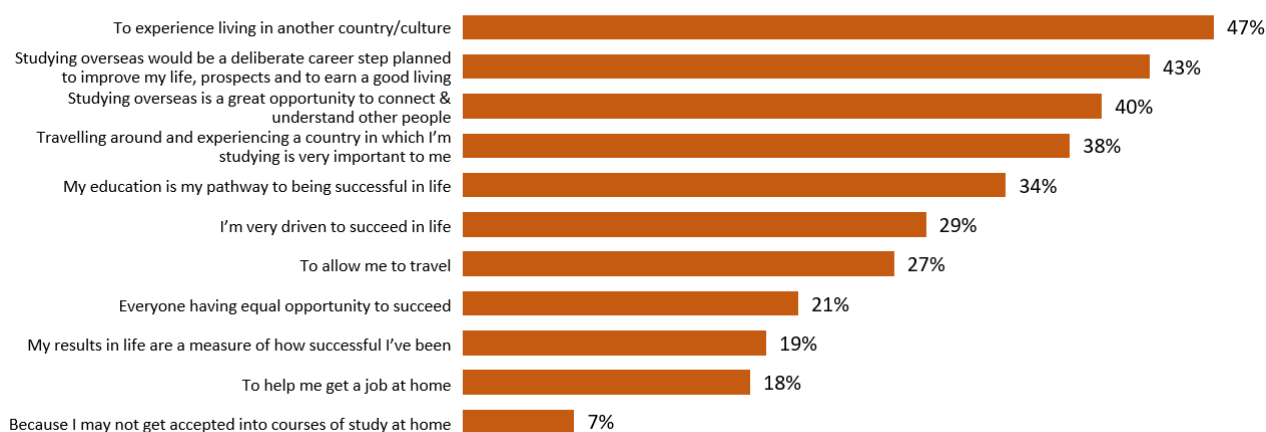
ago.¹⁴ International education is a global, intensively competitive sector with Aotearoa New Zealand competing on a range of factors focused on the attractiveness of the “offering” offered to international students.

The factors in the country decision are broadly unchanged. “Providing you with the knowledge, applied skills and adaptability that will make you ready for the future of work” remains the number one country choice driver.¹⁵

Students are still considering studying for the same core reasons; to live and travel internationally, meet new people and to enhance their employability. The pandemic has only slightly altered the level of demand for international study.¹⁶

In-study and post-study work rights are an integral part of the “offering” for international students. For students, employability has been found to be a key factor in deciding to study offshore and choosing where to study.¹⁷ A 2019 survey of international graduates in Australia showed that 76% considered access to post-study work rights

Why students are still considering study offshore in 2022



¹³ OECD is the Organisation for Economic Co-operation and Development.

¹⁴ OECD, *International Migration Outlook 2022*, October 2022

¹⁵ Kantar, *Understanding the New Zealand education brand in key markets: Brand Health 2022*, July 2022.

¹⁶ Kantar, *Understanding the New Zealand education brand in key markets: Brand Health 2022*, July 2022.

¹⁷ QS, *International Student Survey: Volume 2: Information and Influence*, 2020.

an important factor in their decision to choose Australia as their study destination.¹⁸

Aotearoa New Zealand's competitors

Australia and Canada are Aotearoa New Zealand's main competitors in attracting international students.

Since the start of the pandemic, Singapore has emerged as a new competitor with 26% of prospective students in Aotearoa New Zealand's target countries being aware of Singapore as an education destination. It now has the sixth strongest brand awareness behind the United States of America (USA) (60%), United Kingdom (UK) (46%), Canada (44%), Australia (41%) and Aotearoa New Zealand (27%).¹⁹

Looking forward

ENZ's focus for the future is informed by an environmental scan identifying global megatrends that could impact international education to 2030 (refer to Appendix 1) and a 2022 Brand Health Survey²⁰. Future pandemics are understood as potential disruptors, which has influenced some of the identified trends.

Based on the global megatrends and the Brand Health survey, there are opportunities for ENZ to focus on diversification, aligned to the NZIES and Government's immigration, education and trade policies.

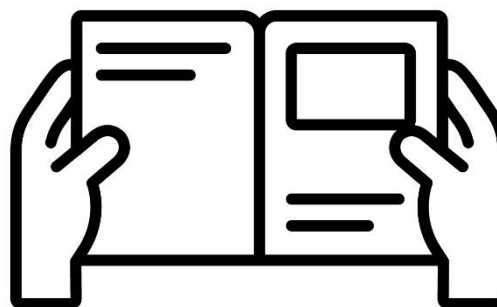
Asia is the main source region for international students, with most international students studying in OECD countries coming from Asia. In 2020, about 60% of international students in the OECD came from the continent, with half of the Asian students originating from two main source countries: China (22%) and India (10%).²¹

ENZ's current international student target countries are Brazil, China, Germany, India, Japan, South Korea, Thailand, USA and Vietnam.

We are currently reviewing our approach to prioritising target countries.

Delivering education products and services offshore

International education was already changing prior to COVID-19. The pandemic has accelerated the acceptance of digital education products and the ability for students to obtain high-quality qualifications without leaving their home country.



To test the attractiveness of Aotearoa New Zealand online learning programmes, ENZ ran a pilot from June to August 2021 utilising an existing online education platform, FutureLearn²². Results from the pilot identified:

- Learners in full-time employment made up over a third of enrolments
- They are a complementary audience segment to Aotearoa New Zealand's traditional student mobility market
- Learner demographics from the pilot suggest there is a significant opportunity to build a new audience complementary to Aotearoa New Zealand's traditional student mobility audience.

This new audience:

- prefers flexible, anywhere, anytime online delivery
- are mid-career and primarily interested in bite-sized "learning chunks"
- may be looking for certificates of completion.

¹⁸ OECD, [International Migration Outlook 2022](#), October 2022

¹⁹ Kantar, [Understanding the New Zealand education brand in key markets: Brand Health 2022](#), July 2022.

²⁰ Kantar, [Understanding the New Zealand education brand in key markets: Brand Health 2022](#), July 2022.

²¹ OECD, [International Migration Outlook 2022](#), October 2022

²² [FutureLearn](#) offers courses from around 250 providers from around the world. These courses range from tasters to full online degrees.

Whilst the online learning market is highly competitive globally and any resulting qualifications are not always recognised by other countries' qualifications authorities, the number of online learners is 200 million vs 4.4 million mobile international students.

Education technology (EdTech) businesses are supporting and informing the way education is consumed around the world and meeting changing learner needs. More than 90% of EdTech businesses export and 65% of local EdTech businesses were established in the last 10 years. Their main markets are the USA and

Australia which account for 50% of exports, followed by Asia and Europe.²³

Aotearoa New Zealand's education publishers offer a wide range of topics across early childhood, primary, secondary and tertiary education, and education research. They have reached learners and educators in 60 countries, in some cases for more than 40 years. They are providers of literacy materials and resources to Australia, the USA, the UK, China and others. Some also develop education content for major multinational publishers.



²³ EdTech New Zealand, [Aotearoa EdTech Excellence: Transforming educational experiences, digital innovation and economic outcomes](#), December 2021.

INTRODUCING EDUCATION NEW ZEALAND MANAPOU KI TE AO

Our purpose is to deliver enduring economic, social and cultural benefits to Aotearoa New Zealand by taking Aotearoa New Zealand education experiences to the world

Education New Zealand Manapou ki te Ao (ENZ) brings the Aotearoa New Zealand Government's goals for international education to life, bringing benefits to New Zealanders and international students. ENZ is a Crown Agency and the only Aotearoa New Zealand government agency solely focused on international education.

Our name, *Manapou ki te Ao*, means nourishing and empowering, and represents how an Aotearoa New Zealand education enables students to flourish and creates the world's next generation of problem solvers.

Section 511 of the Education and Training Act 2020 sets out ENZ's functions (refer to Appendix 2) which include promoting Aotearoa New Zealand education offshore, providing information to international students in Aotearoa New Zealand, undertaking research and providing intelligence, and acting for the Government in relation to international education.

Our monitoring agencies are the Ministry of Education and the Ministry of Business, Innovation and Employment.

The NZIES guides ENZ's objectives and activities as we support the rebuild of the sector. The NZIES sets out a clear path for Aotearoa New Zealand's international education sector under its two Focus Areas and three goals.

Our strategic framework

ENZ supports the international education sector, other government agencies and other partners to sustain the value of international education to

New Zealanders. While the NZIES sets the high-level direction for ENZ, our purpose, vision and mission provide the foundation for achieving our outcomes.

Our purpose

ENZ works to deliver on our purpose through a range of targeted, value-added services to international education in Aotearoa New Zealand and offshore.

To fulfil our purpose, ENZ works with international students, domestic students seeking an international education experience, the international education sector onshore and offshore, other Aotearoa New Zealand government agencies and offshore government partners, sector peak bodies, Aotearoa New Zealand's regions and other governments. ENZ brings the international student voice into decision-making and broader promotion of Aotearoa New Zealand.

ENZ is also part of the New Zealand Story which works to enhance global perceptions and favourability of Aotearoa New Zealand.

Our vision

ENZ's vision is that Aotearoa New Zealand's unique education offering is highly sought after, highly valued and enhances Aotearoa New Zealand's global reputation for leading new thinking and making contributions of consequence. ENZ works towards a future where Aotearoa New Zealand's education offerings are competitive, in-demand and set the tone for the

difference that ENZ wants to make in all aspects of our work.

Our mission

ENZ's mission is to lead the transformation of international education to a sustainable, diverse and resilient sector.

Our people

Ngā Manapou

As part of developing our Rautaki Māori (Māori Strategy), ENZ identified our Ngā Manapou (principles):

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

Ngā Manapou are the set of values that establish support, enhance, and sustain the mana of a person. They are foundational to ENZ's culture and set out how staff are expected to behave and interact with other people.

Our Ngā Manapou create the foundation for ENZ Manapou ki te Ao and support the Aotearoa New Zealand international education brand.

Role of ENZ's Board

As a crown entity, we are governed by a Board (profiled in Appendix 3) whom you appoint. The ENZ Board has six members, chaired by Steve Maharey. The Board:

- sets our strategic direction
- provides guidance on our operations
- monitors the performance of the Chief Executive and the organisation
- oversees management of strategic risk.

ENZ's staff

Grant McPherson, Chief Executive was appointed in 2012 and is supported by the Senior Leadership Team (profiled in Appendix 3).

ENZ employs 109 staff spread across the world.

ENZ's offshore staff are generally co-located with other government agencies in New Zealand Embassies and High Commissions (their locations are shown in Appendix 4). Offshore staff leverage international diplomacy programmes, broker key relationships connecting Aotearoa New Zealand education to the world, lead in-market initiatives, gather market intelligence and promote Aotearoa New Zealand education to prospective international students, education agents and other governments.

To ensure we can deliver on your priorities and deliver our work programme, ENZ works to ensure that we have the capability, systems and processes needed to do so. For example, Te Rautaki Māori team have been working to increase cultural competence and capability within ENZ. This includes resources and activities to encourage staff to improve their te reo Māori skills.

He Rautaki Māori

ENZ developed and launched He Rautaki Māori, our first Māori Strategy, and identified three Ngā Whaingā (key objectives):

- Develop and foster the use of te reo me ōna tikanga by all staff
- Work towards identifying a Māori name for ENZ that encompasses our role, vision, Ngā Mātāpono and Ways of Working
- Weave te reo me ōna tikanga Māori into ENZ's purpose

ENZ worked through a process to establish our Māori name, Manapou, ki te Ao, which was launched in 2019/20.

ENZ's work to support Māori-Crown relationships

ENZ Manapou ki te Ao is committed to giving practical effect to the Crown's Te Tiriti o Waitangi (Te Tiriti) responsibilities, including delivering on

Ka Hikitia – Ka Hāpaitia²⁴ and Tau Mai Te Reo²⁵ in our work and giving effect to Te Tiriti obligations in the Education and Training Act 2020. ENZ is committed to taking a wide and deliberate view of Te Tiriti across our structure, roles and functions to build a comprehensive and applied understanding of what it means for international education in practice.

The Letter of Expectations emphasises key levers for ENZ Manapou ki te Ao that have the potential to deliver longstanding change.

ENZ has begun to facilitate working with Māori, iwi, hapū and Māori providers of education

products and services to transform the understanding of international education and ensure international education delivers both with and for Māori. Our aim is to ensure that Aotearoa New Zealand's education system is presented to the world in a way that acknowledges the importance of Te Tiriti and a Māori world view. Some of these activities are outlined in more detail in this briefing.

ENZ Manapou ki te Ao will endeavour to fully embed practices across our functions to use Māori worldviews.



²⁴ <https://www.education.govt.nz/our-work/overall-strategies-and-policies/ka-hikitia-ka-hapaitia/>

²⁵ <https://www.education.govt.nz/our-work/overall-strategies-and-policies/tau-mai-te-reo/>

EDUCATION NEW ZEALAND MANAPOU KI TE AO ACTIVITIES

To deliver on the goals of the NZIES, ENZ's activities are focused on:

- rebuild and recovery of the sector
- delivering an excellent student experience
- ensuring the international education sector rebuild to be sustainable and resilient
- developing global citizens.

ENZ's funding

ENZ is funded through two Vote Tertiary Education appropriations and receives funding from MFAT to administer the Manaaki New Zealand Scholarships programme.

Funding decreased from 2021/22 to 2022/23 due to:

- Pre-COVID-19, ENZ received \$3.265m per financial year from the Export Education Levy as part of our funding to help fund our

promotion and marketing activities (including the Aotearoa New Zealand education brand), research, and professional development of the international education sector. With the suspension of the Levy until 1 January 2023, ENZ received replacement Crown funding until 2022/23. As a result, ENZ's funding decreased, constraining our activities as the border reopened.

- One-off funding for brand awareness, marketing and communications to support the post-COVID rebuild was received in 2021/22.

Baseline funding will decrease further from 2022/23 to 2023/24 with the completion of time-limited funding to support work to diversify international education products and services (a description of this work is outlined on pages 22-23).

ENZ's funding 2021/22-2023/24²⁶

Revenue and expenditure summary (\$000s)	2021/22 Actuals ²⁷	2022/23 Budget	2023/24 Budget Estimate
Revenue			
International education programmes (including funding from COVID-19 Response and Recovery Fund and Export Education Levy)	37,664	31,247	27,247
Tertiary scholarships and awards	3,750	3,750	3,750
Other revenue e.g. costs recoveries, interest	303	568	768
Total revenue	41,717	35,565	31,765
Total expenditure	41,618	35,565	31,765
Net surplus/(deficit)	99	-	-

²⁶ ENZ's funding excludes the passthrough funding received from MFAT for the Manaaki New Zealand Scholarships programme. The table reflects the funding appropriated by the Crown to ENZ plus revenue from costs recoveries and interest that can be spent to deliver on ENZ's functions as set out in the Education and Training Act 2020 and deliver on the Letter of Expectations.

²⁷ The 2021/22 Actuals are unaudited as Audit New Zealand is currently undertaking its' audit for the 2021/22 year. The final audited results will be provided in ENZ's *Annual Report 2021/22*.

Rebuild and recovery of the sector

Build preference for and promote Aotearoa New Zealand education

With the announcement that Aotearoa New Zealand will be open for visa applications from international students from 1 August 2022, ENZ launched on 1 June a brand awareness campaign in nine key partner markets. The campaign, called I AM NEW targeted 18-24 year olds interested in “Study Abroad” and “International Education” and parents of 13-17 and 18-25 year olds.

It tells the stories of a range of students who have come to study with Aotearoa New Zealand, and the unique benefits that come from the weaving together of different cultures here in Aotearoa New Zealand using the graduation garb – a hugely respected icon of education. World-famous Māori fashion designer Kiri Nathan led a team of creatives to work alongside international students.

The campaign was launched at the 2022 NAFSA²⁸ conference in Denver at which Minister Hipkins and Kiri Nathan both addressed plenary sessions.

An important part of the campaign is the in-market events, activities and public relations. A good example is the public relations activities completed in China where The People's Daily Overseas Edition, one of China's most authoritative state-owned media, conducted an exclusive feature with Wang Hanbo, one of the students featured in the campaign. In total, ENZ collected 60 clippings with 14,463,302 views.

Successful agent and student fairs were held in many partner countries including Vietnam and Thailand. An education fair hosted in Hanoi and Ho Chi Minh City (HCMC) in October saw 41 Aotearoa New Zealand international education providers participate in both events and in total, there were 1,222 student registrations (394 in Hanoi and 828 in HCMC). Both interest levels and



²⁸ NAFSA is the world's largest international education conference.

attendance were much higher than pre-COVID. For the first time, ENZ had INZ deliver a dedicated session with prospective parents/students.

A country specific approach

A different approach was taken in Colombia, a country with possibilities to build and deepen indigenous connections. The launch of the campaign in Spanish created an opportunity to present Aotearoa New Zealand as a bicultural country, acknowledging the importance of Te Tiriti and a Māori world view. An event that was held with ENZ's Manukura attending, had an audience of about 80 guests, including university representatives, school directors, government stakeholders and education agents, generating 11 clippings and 5,975,104 people viewed its' publicity.

Alongside ENZ's Government-to-Government supporting activities, ministerial visits are an important component of our brand preference building activities. Focusing on brand preference, having Minister Hipkins make visits to Brazil, Chile, Indonesia, Singapore, South Korea, Thailand and the USA, along with the Prime Minister's visit to Japan, and Vietnam have been very important in communicating that Aotearoa New Zealand is open for business. Minister Hipkins also held two virtual ministerial meetings with his Chinese counterpart in August and November last year.

These visits are an opportunity to generate media coverage and engage with key stakeholders and influencers in-market. In South Korea, for example, ENZ hosted its first agent seminar in Seoul since 2019 during Minister Hipkins' visit, with 44 education agents and 32 international education providers being represented.

An essential component of all elements of brand awareness and preference is the ENZ delivered

[Study With New Zealand](#) website. Delivered in nine languages, the website gives prospective students all the information they need about why they should, and how they can study with Aotearoa New Zealand, including the ability to enquire directly to providers. From 1 June to 31 December 2022, there were more than 2.5 million sessions and views on the website.

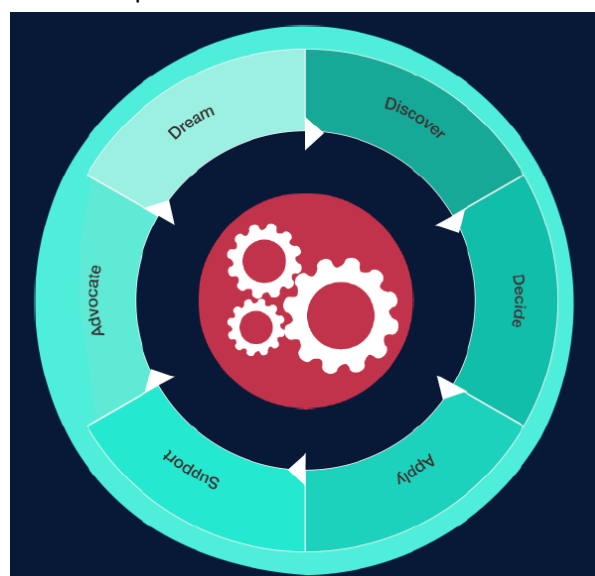
Supporting the rebuilding of international education providers' capability and capacity

ENZ uses our expertise and insights to support providers in taking advantage of new opportunities, broadening their perspectives and ensuring there is a clear line of sight between the Government's priorities for international education, and the sector's ability to deliver on these. We work with Te Pūkenga and other providers to develop their international brand and value propositions for individual products and services.

Delivering an excellent student experience

Delivering an excellent student experience

ENZ provides services to international students at all stages of their student journey to ensure that they are well informed and have an excellent student experience.



The Ministry of Education is responsible for developing the pastoral care standards for international students. The New Zealand Qualifications Authority administers the Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021 (the Code) which supports the wellbeing of tertiary and international learners enrolled with education providers and sets out the requirements that education providers must meet for the wellbeing and safety of their learners. ENZ works closely with these agencies and others to influence the policy settings and processes to encourage and support international students currently in Aotearoa New Zealand to continue to stay here for further study.

[NauMai NZ](#), our student experience portal, provides consistent, relevant and accessible information for international students, via a single trusted source. For example, there is a page that encourages and provides guidance on speaking Te Reo Māori as Te Reo is a very important part of Aotearoa New Zealand's culture. NauMai NZ contributes to supporting the sector to deliver on their student wellbeing responsibilities.

ENZ also hosts a NauMai NZ Wechat mini-programme to cater for Chinese international students on their preferred platform of choice.



ENZ created the Tū Ngātahi programme (#TūNgātahi) in 2020 to enable the international education community to welcome and demonstrate support for international students. Tū Ngātahi calls people to 'stand together'. The

central image is the pounamu carved into a Pikorua twist. This twist design is inspired by the pikopiko fern whose fronds curl around one another and is a symbol of the connection of cultures and the importance of friendship.

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

Key connections and partnerships in targeted countries that contribute to a connected Aotearoa New Zealand

ENZ fosters and maintains key connections and mutually beneficial partnerships to support international education in targeted countries that contribute to a connected Aotearoa New Zealand and help improve Aotearoa New Zealand's reputation education-wise and global research connectivity over the long-term. To do this, ENZ undertakes or supports Government-to-Government activities and supports institutional relationships and academic relationships.

Through our offshore footprint, ENZ connects and facilitates connections with the broad network of influencers in the international education ecosystem. In alignment with the NZIES goals and to increase our intentionality in driving these key internationalisation engagements in areas of interest to Aotearoa New Zealand, ENZ is developing a comprehensive internationalisation strategic framework.

ENZ draws on Aotearoa New Zealand's unique experience and relevance to position itself as a suitable partner in countries where there is demand for indigenous education opportunities and collaboration. Our focus will be to increase bilateral academic cooperation and research, and to position Aotearoa New Zealand as a country

with a rich bicultural heritage and a unique global perspective.

Contributing to establishing strong foundations for the sector to operate within our target countries are reciprocal partnerships that provide mutual benefits for both countries. Some of these flagship partnerships include:

- The Tripartite agreement with the Ministry of Education of the People’s Republic of China to encourage the development of strategic research relationships
- The Gilman scholarship with the USA’s Department of State to support students who have traditionally been underrepresented in study abroad, including those of Native American heritage
- The German Academic Exchange Service in Germany and FAPESP (Sao Paulo Research Foundation) agreement in Brazil are research funding agreements to strengthen academic relations with German and Brazilian institutions to promote cooperative and complementary research activities
- An agreement with the Hokkaido Board of Education in Japan to promote collaborative opportunities in education through shared interests including indigenous culture, primary industries and sport.

Ensuring the international education sector rebuild to be sustainable and resilient

International education is high-value and high-quality, sought out for its distinctive Aotearoa New Zealand proposition

In November 2019, as a strategy to prioritise value over volume, ENZ completed market research to understand the segmentation of the young people considering international education.

The research identified a market segment that holds values highly aligned with what Aotearoa New Zealand offers. Known as the

“Knowledge/Experience” segment the two most defining statements for this segment are a desire to experience living in another culture/country, and that it’s as much about the adventure as the study. The research went on to conclude that this is around 27% of the global market, is well-represented across our partner countries, and their preference for and consideration of Aotearoa New Zealand is higher than other segments.

Adopting a segmented approach to marketing in 2023 and beyond will be essential to getting the right, high-value students to study with Aotearoa New Zealand in an environment of constrained budgets.

Support the international education sector to strengthen its capability

ENZ works with international education providers, sector peak bodies, and regional economic development agencies to strengthen capability in the long-term. While our immediate focus is to support the immediate capability needs to attract international students to Aotearoa New Zealand and support the student experience, ENZ’s activities will evolve to reflect ENZ’s value proposition and feedback from the sector.

We continue to develop a deep understanding of Aotearoa New Zealand’s capacity and capability for international education, so we can identify the opportunities and barriers for sustainable development.

ENZ supports the sector in their decision-making about new opportunities, using our expertise and insights to guide the sector towards new opportunities, and supporting them to develop the capability and capacity to deliver on these opportunities. To do this, we undertake and share our research with the sector, including research on market perceptions of quality and how Aotearoa New Zealand’s education is perceived internationally.

ENZ runs the annual New Zealand International Education Conference Ki Tua (NZIEC Ki Tua) to bring together practitioners and leaders from Aotearoa New Zealand’s international education

sector and from offshore to provide an opportunity to connect expert speakers and delegates. It is the only New Zealand-based event when the international education sector comes together to learn from each other, share their passions and ideas, and help shape the sector's future. ENZ is organising the 30th NZIEC Ki Tua 2023 which will be held in Ōtautahi Christchurch from 16-18 August 2023.

ENZ works with Publishers Association of New Zealand Te Rau o Tākupu and EdTech New Zealand to support education publishers and EdTech businesses. We partner with them to undertake research and strategic initiatives, facilitate introductions and connections for companies delivering education products and services offshore, including through the NZ Inc offshore network.

ENZ supports visibility and awareness raising activities of businesses delivering education products and services offshore by promoting and marketing Aotearoa New Zealand education in global markets, and also sharing data and insights into global and emerging markets.

Historically, education agents have been a key channel for attracting international students to Aotearoa New Zealand and supporting those students while they study here. Via [AgentLab](#), ENZ provides education agents with tools, training, and information to promote Aotearoa New Zealand and support international students in Aotearoa New Zealand.

The international education sector flourishes through innovative products and services

After the start of the pandemic in 2020, the Government agreed to fund a programme through to 30 June 2023 to support sector and broader economic recovery via the diversification of international education products and services. This work seeks to answer the following questions:

- What new international education products and services could set Aotearoa New Zealand apart from its competitors?
- How do students want to engage with the Aotearoa New Zealand education experience – online, in their home country, in Aotearoa New Zealand, mixed?
- What is the best way to deliver this future experience for students and for Aotearoa New Zealand?
- What is the best way to increase the sector's resilience to future shocks?
- How do we best give effect to Te Tiriti o Waitangi?

A key investigation for the programme will also be understanding and agreeing:

- What the role of ENZ is in the future to support innovation and diversification across the sector to ensure resilience and sustainability
- How this work is woven into ENZ ongoing strategy and operations.

The programme has three workstreams:

- **New Products and Services:** Exploring the creation of new products and services pilots aimed at transforming the way international learning is developed, promoted and delivered
- **Offshore Delivery:** ENZ has been working with Aotearoa New Zealand universities to explore and test the value of developing a coordinated pathway initiative under the Aotearoa New Zealand education brand. This initiative is currently paused and being reviewed, given the growing transnational education capabilities of our universities
- **Digital Delivery:** A series of online education platform pilots, designed to understand sector appetite and capability for delivering online education, global audience demographics, behaviour and preferences, and commercial models. It comprises of two pilots with FutureLearn and a locally developed pilot.

Tokona Te Raki – Indigenous future-making

Tokona te Raki are an indigenous social innovation lab operating under the mana of Te Rūnanga o Ngāi Tahu. With over 76,000 registered tribal members and a territory covering over 80% of the South Island Te Waipounamu. Tokona te Raki work with indigenous youth to develop pathways into digital futures, understand future tribal skill needs and hone tribal innovation models. Through the COVID-19 Response and Recovery Fund, ENZ has supported them to start developing an online platform for indigenous knowledge exchange between and within Māori and other indigenous cultures. Included in the platform is an indigenous future-making framework, curriculum and learner toolkit.

Following the completion of the pilots, ENZ will report back on the outcomes and learnings generated to inform future decisions on whether the activity and funding should continue, and how the findings from this work feeds into Focus Area 2 of the NZIES.

Developing global citizens

Students gain the knowledge and skills they need to live, work and learn globally

Prime Minister's Scholarships for Asia and Latin America

Traditionally, ENZ helps Aotearoa New Zealand students build life-long friendships and networks by running the Prime Minister's Scholarship for Asia and the Prime Minister's Scholarship for Latin America. These scholarships support Aotearoa New Zealand's education, economic and

trade agendas by enabling New Zealanders to enhance their skills through study or internships offshore across a wide range of courses and locations. Since 2013, the scholarships have enabled more than 2,879 New Zealanders to broaden their horizons through life-changing learning experiences in these regions.

Alumni story

Harrison Gibb-Faumuina was awarded a scholarship in 2014 to study Japanese, Chinese, and Linguistics for a year at Tokyo University of Foreign Studies. He was also able to take specialised courses not available in Aotearoa New Zealand and undertake two internships in Tokyo.

As a result, he was offered a job with one of the companies he had interned with. Harrison said "When I look back on how I got to where I am, it's because I came to Tokyo on the scholarship. It's played a huge part in my life."²⁹

ENZ has been reviewing the scholarships to ensure they deliver on the government's Te Tiriti commitments as set out in the Education and Training Act 2020, and that the scholarships remain responsive to the needs of applicants, scholars and institutions. In 2022, ENZ made operational improvements to the scholarships to encourage more Māori and Pasifika to apply for the scholarships and to reflect the increased costs for recipients' flights and living costs. We will provide you with advice about further changes to strengthen the scholarships.

Manaaki New Zealand Scholarships programme

MFAT transferred responsibility for the operational management of the Manaaki New Zealand Scholarships programme to ENZ on 1 November

²⁹ <https://scholarships.enz.govt.nz/category/alumni-stories/harrison-takes-path-less-travelled-for-pasifika-students/>

2022. MFAT continues to remain responsible for setting the strategic direction, alumni relationships and funding the programme.

The Scholarships are a key pillar of Aotearoa New Zealand's International Development Co-operation, offering more than 1,100 scholarships annually to students from 112 eligible countries to study in Aotearoa New Zealand, in the Pacific, or online. The Scholarships represent the Government's single largest investment in international scholarships and have been awarded for more than 70 years.

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

International education provides stronger global connections, research links and partnerships

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

Rautaki Māori was instrumental in facilitating cooperation agreements with different universities

and providing cultural guidance where appropriate.

ENZ's first education cooperation arrangement written in both te reo Māori and English

ENZ and the Louis Stokes Alliance for Minority Programs-NSF International Center of Excellence (LSAMP-NICE) LSAMP signed an Education Cooperation Arrangement (ECA) to promote friendship and develop academic mobility between Aotearoa New Zealand tertiary institutions and LSAMP institutions, co-funding partnership around indigenous bilateral research.

The ECA is ENZ's first ECA written in both Te Reo Māori and English and the first to be signed by ENZ's Manukura, representing a step forward in ENZ's Te Tiriti obligations. Following the signing of the ECA, LSAMP plans to fund LSAMP researchers and students to study and research in Aotearoa New Zealand, as well as LSAMP institutions to receive underrepresented New Zealand students (such as Māori and Pasifika students) on USA campuses.³⁰

New Zealanders understand and embrace the benefits of international education

ENZ works to increase New Zealanders' understanding of the broader benefits of international education, effectively creating the sector's social licence to operate. The stories of international students in Aotearoa New Zealand and their home countries are at the centre of this programme. ENZ's [New Look](#) website presents more than 50 stories and six videos of impressive and successful international students and the

³⁰ <https://www.enz.govt.nz/news-and-research/ed-news/new-eca-signed-with-us-institution/>

benefits they deliver to Aotearoa New Zealand. Visitors are driven to the site through advertising on Facebook and Instagram. In parallel, ENZ is working with education institutions and regional economic development agencies to generate media coverage for international education in regional media.

ENZ also monitors New Zealanders attitudes towards international education. The 2022 survey³¹ found that 73% of New Zealanders either agree or strongly agree that international students benefit New Zealand. While this is good news, there remains work to be done.

Other online platforms and videos

ENZ's other platforms to support or promote international education:

- [enz.govt.nz](#) is ENZ's corporate and primary sector facing website
- [IntelliLab](#) provides information and market intelligence on international education
- [Brand Lab](#) provides marketing and promotion material which education providers and other organisations can use to promote Aotearoa New Zealand education
- [Skills Lab](#) provides Aotearoa New Zealand international education providers with an online toolkit of projects, advice and tips on a range of topics.

Links to ENZ's videos

- [I Am NEW](#)
- [Tū Ngātahi](#)
- [Social licence](#)

³¹ ENZ, *New Zealanders perceptions of the value of international students, 2022*.

BRIEFINGS FOR THE MINISTER

ENZ briefings that have been provided for your consideration

ENZ tracker number	Title
2122-159	Broader benefits of International Education for New Zealanders – Baseline Valuation
2223-112	International student recruitment: Further update

ENZ's Annual Report 2021/22

ENZ has not yet published its Annual Report for 2021/22 due to capacity challenges at Audit New Zealand. We anticipate publishing this Annual Report in February/March 2023, which will include the Annual Report being provided to you for review, and then for tabling in Parliament.

This will be followed by ENZ submitting its Annual Review 2021/22 responses to the Education and Workforce Select Committee by 15 March 2023.

A new Statement of Intent and Statement of Performance Expectations

ENZ is developing a new Statement of Intent for 2023-2027 as directed by the previous Minister of Education. The new Statement of Intent will reflect the refreshed NZIES, and that Aotearoa New Zealand's borders reopened from August 2023. We are working on the new Statement of Intent with support from the Ministry of Education. The Crown Entities Act 2004 requires that you receive a draft of the new Statement of Intent for comment by 30 April 2023.

As required by the Crown Entities Act 2004, we are also developing a new Statement of Performance Expectations for 2023/24. This must be published by 30 June 2023. The Act requires that you receive a draft of the Statement of Performance Expectations for comment by 30 April 2023.

Potential improvements to the Prime Minister's Scholarships for Asia and Latin America







The pandemic provided ENZ with an opportunity to review the Prime Minister's Scholarships for Asia and Latin America, and to analyse how the scholarships could be strengthened and more strongly aligned with the NZIES, and to enable greater diversity of participants to undertake the scholarships. ENZ is developing advice for you on potential permanent changes to strengthen the scheme. This advice will be provided to you in due course.

Other agencies' reports that ENZ has input into

Agency	Title
Ministry of Education	Ministerial travel advice for 2023

APPENDIX 1: MEGATRENDS TO 2030 AFFECTING INTERNATIONAL EDUCATION

This environmental scan is a high-level snapshot of the global megatrends signalling opportunities and risks for international education. These interconnected trends are not a comprehensive list. However, they highlight the key areas of interest to Aotearoa New Zealand’s international education sector taking a global perspective.

					
Geopolitical shifts affecting national economies	Digital growth’s pathway to opportunities	Climate change and sustainability	Energy and resources impacting global mobility	Demographic shifts and future markets	Complex decision- making environment
<p>Political power shifts with power centres becoming more polarised</p> <p>Trading partners’ domestic policies impacting on global trade</p> <p>Economic power shifts to emerging countries including an emerging Asia-Pacific bloc</p> <p>Uncertainty and unpredictability in global economic climate: high inflation, rising interest rates</p> <p>Increasing national self-reliance narrative and move towards re-shoring and domestic capacity building</p>	<p>Technology and digital growth continue particularly in the service industry, such as international education</p> <p>Increased investment into artificial intelligence research and developing science innovation</p> <p>Digitally hyper connected communities’ expectations for increased and improved digitally based products and services</p>	<p>Uncertain and more violent weather events signalling climate change affecting global mobility</p> <p>Access to food, water, and raw materials from key/major suppliers</p> <p>“more than half of global GDP dependent on nature”</p>	<p>Shift away from fossil fuels to renewable energy to mitigate climate change</p> <p>Increased focus on shifting away from fossil fuel-based travel options</p> <p>Increased expectations of living locally and studying/working globally</p> <p>Increased pressure for and focus of governments to shift towards a low carbon economy pose challenges for mobility options and cost of travel</p>	<p>Population growth decreasing – aging population and decreasing workforce provides opportunities for re-tooling</p> <p>Africa’s population to increase, Asia’s to remain a ‘population giant’</p> <p>Learner preferences will continue to be responsive to changing global trends – technology, socio-economic-cultural environment</p>	<p>The scale of parliamentary or presidential elections scheduled globally for 2024 have implications for global governance and alliances</p> <p>Rising levels of dissatisfaction and ‘democracy fatigue’ – a challenge for governments to maintain social cohesion</p> <p>Increased pressure from consumers and citizens for decision-makers for greater transparency, fairness, environmental and social governance – highlighting the role of social licence</p>

IMPLICATIONS

<ul style="list-style-type: none"> Global recession and high inflation (USA/Europe/UK) driven by strong demand for disrupted supply chains for energy and goods; domestic economic slowdown impacted by wage-setting and businesses closing down Rising interest rates reducing spending power and borrowing for investment projects 	<ul style="list-style-type: none"> Studying online is becoming normalised The landscape of student expectations is changing in favour of more remote learning to prepare them for a high-tech future– whilst being enrolled in one institution The nature of work and the skills employers demand is shifting: Increasing focus on micro-credentials and lifelong learning. The nature of work and the skills employers demand is shifting. Increased preparation for a high-tech future For Aotearoa New Zealand, domestic students behaviour (increased online study) impacts international student experience and attractiveness as a study destination 	<ul style="list-style-type: none"> Disruption to supply chains for goods Opportunity presented by domestic and global climate goals to tackle productivity challenges There is a demand from indigenous groups to explore and learn from other indigenous groups about indigenous education strategies/approaches 	<ul style="list-style-type: none"> Consideration of environmental impacts of travel will impact choices and potentially affect demand for on-shore Aotearoa New Zealand’s education offering Increasing awareness of sustainability and related issues presents opportunities for Aotearoa New Zealand’s unique and/or indigenous offerings Increasing cost of travel due to travel options and energy scarcity in the short to medium-term 	<ul style="list-style-type: none"> The global market for international education is still sizeable – however needs to be assessed in the context of a global recession Opportunities for diversification of markets and market segmentation for education products and services Current high employment rate signals continued labour shortages across several industries/sectors 	<ul style="list-style-type: none"> Impact of global policy environment affecting Aotearoa New Zealand government policy, impacts on onshore and offshore/online study offerings Understanding major drivers of policy shifts within our competitors’ landscape requires Aotearoa New Zealand’s offering to be responsive to these changes to be globally competitive
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Sources:

- CSIRO, [Seven megatrends that will shape the next 20 years](#), July 2022.
- RolandBerger, [Trend Compendium 2050: Megatrends shaping the coming decades](#), December 2020.
- MegaTrends Watch Institute, [Megatrends 2050: The world in 2050](#)
- UNESCO Policy brief presentation at Australian International Education Conference (AIEC), Brisbane, 2022
- FutureLearn, [The Future of Learning Report](#), February 2021
- Beyond Recruitment, [Beyond Recruitment Economic & Labour Report 2022/23](#), Economic commentary by Shamubeel Eaqub
- EdTech New Zealand, [Aotearoa EdTech Excellence: Transforming educational experiences, digital innovation and economic outcomes](#), December 2021

APPENDIX 2: EDUCATION NEW ZEALAND MANAPOU KI TE AO LEGISLATION

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

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



APPENDIX 3: BIOGRAPHIES

ENZ's Board

Steve Maharey | Chair



Steve Maharey is an independent Director, commentator and consultant on a wide range of social and political issues. He was previously the Vice-Chancellor of

Massey University. He is a former Member of Parliament and Senior Minister in the Aotearoa New Zealand Government (1999-2008). In 2009, as part of the Queen's New Year Honours List, Steve was made a Companion of the New Zealand Order of Merit for services as a Member of Parliament.

Lyn Provost | Deputy Chair



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

Zealand Police. Lyn recently completed a six year term on the International Auditing and Assurance Board. In 2016 she received the Global category award in the nationwide Women of Influence awards. In 2017, as part of the Queen's Birthday Honours List, Lyn was made a Companion of the New Zealand Order of Merit for services to the State.

Ziena Jalil



Formerly an international student, Ziena is an award-winning business and public sector leader, with 20 years' experience working in New Zealand and Asia. She consults on strategy and

stakeholder engagement, and is a keynote speaker and commentator on governance, leadership, Asia business, nation branding, and diversity, equity and inclusion. Her other governance roles include Toka Tū Ake EQC, Asia New Zealand Foundation, DNA and the Cancer Society of New Zealand.

Her previous executive roles include Regional Director (South and Southeast Asia) for ENZ, New Zealand Trade Commissioner to Singapore, and Head of North Asia Marketing and Communications for New Zealand Trade and Enterprise (NZTE).

Dr Linda Sissons



Dr Linda Sissons is a highly experienced chief executive in the tertiary education sector. Dr Sissons is currently the Acting Chief Executive at UCOL. She was also a

member of the NZIST Establishment Board (2019-2020).

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

Rachael Tuwhangai



Rachael is a descendant of the Tainui Waka and of Ngati Maniapoto. She is Co-Director of Māori and Pasifika Support Services which focuses on the intersection between

indigenous peoples and improving social outcomes. She is a former academic of the University of Auckland's Faculty of Education;

Education Manager of the Auckland South Corrections Facility, and a former Secondary School Teacher.

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

Daniel Wilson



Daniel Wilson started his career in Auckland as a music teacher. After positions at several schools in Auckland and London, Daniel was appointed to the

Leadership team at Manurewa High School in 2007, firstly as Deputy, then Associate Principal.

In 2015, Daniel moved to Nelson to take up the position of Principal at Nayland College. Daniel has extensive knowledge of international education from a secondary perspective, with Nayland College hosting approximately 80 international students from around the globe in 2020.

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

ENZ's Leadership Team

Grant McPherson | Chief Executive

Grant McPherson is ENZ's first Chief Executive. Grant's previous experience includes roles as Deputy Chief Executive and General Manager, Strategy at NZTE, following extensive experience as Regional Director, South/South East Asia and Group General Manager, Business Solutions on the NZTE Leadership Team.

Ed Tuari | Manukura Chief Advisor Māori

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

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

Geoff Bilbrough | General Manager, Marketing and Communications

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

His team leads ENZ's creative direction and marketing, acts as custodian of the brand, and

provides strategic external communications and PR to support the sector.

Fiona Cameron | General Manager, People, Culture and Capability

Fiona has an extensive mix of private and public Human Resources/Organisation Development experience. She has worked in globally based organisations and in many of the Aotearoa New Zealand education sector agencies. Fiona has a Diploma in Teaching, an MA (hons) in French Literature and a Graduate Diploma in Commerce specialising in commercial law.

Fiona's group focuses on making ENZ a great organisation to work. The team leads work in building a culture at ENZ where being passionate, innovative, knowledgeable and business savvy are highly valued.

Wendy Kerr | General Manager, Sector Engagement

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

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

Lisa Futschek | General Manager, International

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

Her global team, based across 17 locations around the world, is focussed on profiling Aotearoa New Zealand as an education partner and ensuring international education contributes to Aotearoa New Zealand's international relations goals.

Matt Penney | General Manager, Corporate Services

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

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

Sahinde Pala | General Manager, Sector Services

Sahinde joined ENZ in 2016 after 18 years working for a multinational group of English language schools. With a career dedicated to international education, she brought extensive private sector experience in international marketing, stakeholder engagement and student experience delivery to the organisation. Sahinde is based in our Auckland office.

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

Di Solomon | General Manager, Government Relations

Di is a public sector leader with over 15 years' experience working across a number of central and local government agencies. Her aim is to

ensure Aotearoa New Zealand's international education sector is resilient, sustainable, globally connected and provides an excellent education experience. Formerly an international student, Di holds a Masters in Environmental Policy from Lincoln University.

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



APPENDIX 4: MAP OF EDUCATION NEW ZEALAND MANAPOU KI TE AO LOCATIONS



APPENDIX 5: GLOSSARY

EdTech	Education technology
ENZ	Education New Zealand Manapou ki te Ao
INZ	Immigration New Zealand
International education providers	This term is used to describe Aotearoa New Zealand's English language schools, Te Pūkenga, private training establishments, schools and universities
International education sector (the sector)	This is Aotearoa New Zealand's international education sector which is made up of English language schools, schools, Te Pūkenga, private training establishments, universities, education businesses (e.g. education technology, education publishing), education agents and Aotearoa New Zealand government agencies
International students	International students are non-residents of Aotearoa New Zealand and have expressly entered Aotearoa New Zealand with the intention of study or have enrolled with an Aotearoa 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
MFAT	Ministry of Foreign Affairs and Trade
NZIES	The New Zealand International Education Strategy 2022 - 2030
NZ Inc	The collaboration of Aotearoa New Zealand government agencies, particularly when operating offshore. This includes agencies such as ENZ, Immigration New Zealand, Ministry of Foreign Affairs and Trade, and New Zealand Trade and Enterprise
NZTE	New Zealand Trade and Enterprise
OECD	The Organisation for Economic Co-operation and Development

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