

Education New Zealand

Briefing to the Incoming Minister
4 November 2020

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INTRODUCTION

International education changes people's lives. It brings people together to share ideas. It builds global skills, knowledge, cultural competencies and creates networks between New Zealand and other countries. It delivers educational, economic, social and cultural benefits for New Zealand. International education intersects with many government portfolios, particularly education, economic development, immigration, foreign affairs, tourism, and trade and export growth.

International education is made up of international and New Zealand students travelling overseas for study and New Zealand's education products, services and approaches being delivered anywhere in the world.

New Zealand's international education sector is made up of schools, universities, institutes of technology and polytechnics (ITPs), private training establishments (PTEs), English language schools (ELS) and education businesses (like education technology). New Zealand's high-quality education along with being seen as a safe and welcoming study destination has brought benefits to New Zealand.

In 2019, international education's economic contribution to New Zealand was \$5.23 billion, nearly all generated from international students studying in New Zealand. Prior to the COVID-19 pandemic, the shift in New Zealand's policies and regulatory settings were achieving the goals of the *International Education Strategy 2018-2030*,

including a change from a focus on international student numbers to focusing on value.

International education is undergoing the biggest crisis in its history as restrictions on international travel have severely impacted international education globally.

The Government's Strategic Recovery Plan for International Education was launched to rebuild the sector and address the impacts and major challenges affecting the sector due to the COVID-19 pandemic. Areas for additional support to address these challenges could include further financial support for the sector to retain their capability and infrastructure.

Education New Zealand Manapou ki te Ao's (ENZ's) focus is to build a path to recovery by working with the international education sector and other government agencies.

ENZ works with other government agencies and the international education sector in New Zealand and overseas to implement the Government's priorities for international education so that New Zealand benefits. To achieve this, ENZ has refocused its activities to support the recovery of international education and the growth of the New Zealand economy.

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



Steve Maharey
Board Chair



Grant McPherson
Chief Executive

LOOKING FORWARD

Issues for the Minister to consider

As a priority, ENZ suggests that you consider how to address emerging issues threatening the successful implementation of the Strategic Recovery Plan for International Education. These emerging issues are:

- **Confidence:** The international education sector, and countries that New Zealand attracts international students from, would like a positive statement of confidence from the Government on the future of international education.
- **A path to re-opening the border:** Competitive pressure is mounting with our competitors signalling the opening of their borders to international students. The sector would like to discuss how they could support the quarantine management model to cater for numbers of international students and the timelines involved.
- **Short-term relief to retain capability and infrastructure:** The immediate support provided to PTEs and ELS in the Recovery Plan was intended to be short-term in nature. Education providers are implementing or considering actions, including retrenchments, in response to the pandemic that will also have flow on effects to support staff, including homestay providers. The sector is at risk of losing the capability and infrastructure needed to support the recovery of the sector. With the continued closure of the New Zealand border to nearly all international students, additional short-term initiatives to help these providers retain staff and protect their infrastructure in a further targeted assistance package could be considered.
- **New Zealanders' support for international education:** The social licence of international education is a critical success factor for the

sector, with international education seen as a key component of New Zealand's future. ENZ would like your support to increase understanding of the wider benefits of international education with New Zealanders, other government agencies, regional bodies and other ministers.

- **Different modes of delivery:** The Recovery Plan is focused on the need to diversify to new modes of delivery, including online, blended and offshore delivery to new markets. ENZ is working with the sector to explore these opportunities to grow how and where a New Zealand education is delivered. Further support for this work will support the sector to transform to a more sustainable future.
- **Work together to implement the Recovery Plan:** The international education sector and government agencies could be undertaking a lot of the Recovery Plan's work programme while the border is closed. A focus on this work would accelerate progress in implementing the Recovery Plan.

ENZ's Annual Report 2019/20

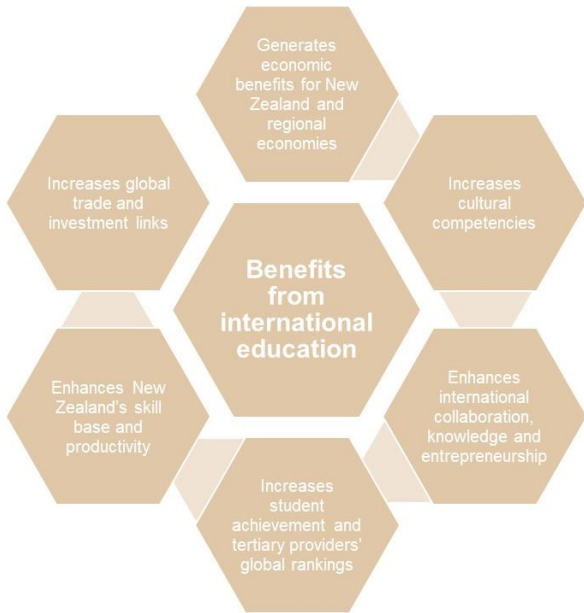
ENZ's final *Annual Report 2019/20* will be provided to you in December 2020, including copies for delivery to the Office of the Clerk to enable the report to be tabled in Parliament. ENZ will publish the Annual Report in January 2021.

ENZ's Statement of Intent and Statement of Performance Expectations

ENZ will amend its Statement of Intent and Statement of Performance Expectations to incorporate your priorities and the desired outcomes of the Recovery Plan. Drafts of these documents will be provided to you for review and feedback in due course.

INTERNATIONAL EDUCATION

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



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.

Relationships created through international education, including alumni networks, support

New Zealand's relationships with key trading partners and help develop opportunities for growth in many other sectors for both New Zealand and other countries.

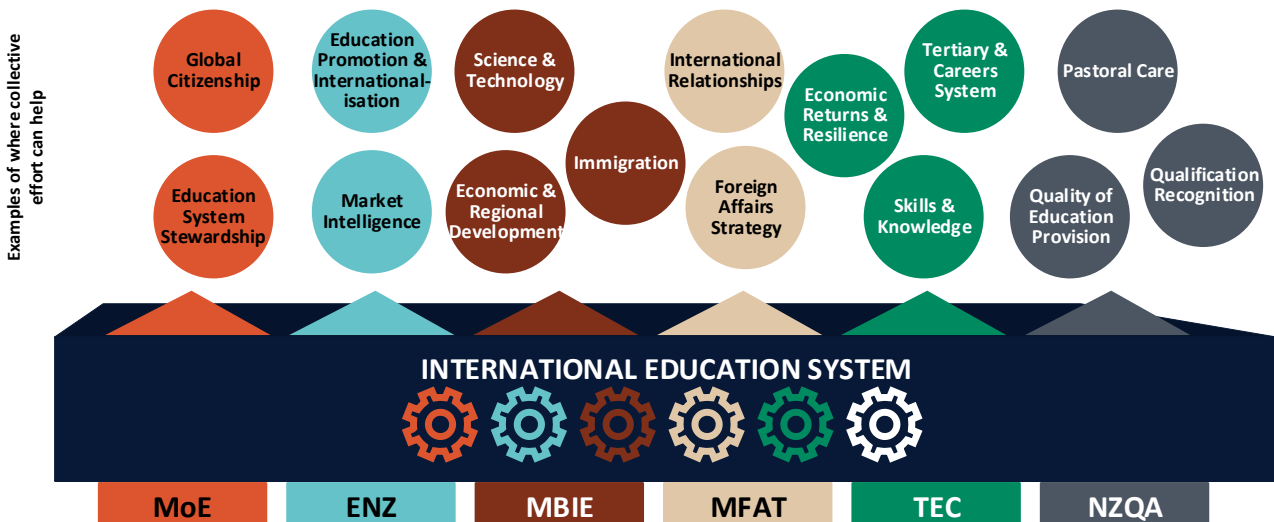
In education, it enhances collaboration and builds stronger global connections, research links and partnerships for education providers. International education increases the research output of providers which can, in turn, increase New Zealand tertiary providers' global rankings.

The economic benefits of international education are clear. Before COVID-19, international education was New Zealand's fifth largest export sector, contributing \$5.23 billion to the New Zealand economy in 2019.

Other portfolios and agencies involved

New Zealand's policy environment for international education is complex. To ensure that New Zealand achieves the best overall benefits from international education, New Zealand needs to have an aligned and coordinated approach across key government agencies. Policy and regulatory settings affect international students and New Zealand students looking to undertake an international education experience as well as education providers and businesses.

Many government agencies, including the Ministry of Education and Ministry of Foreign Affairs and



Trade, have a stake in international education while other agencies, like the Human Rights Commission, help to create the environment for international students in New Zealand. The key New Zealand government agencies involved in international education are shown in the diagram on the previous page.

Outcome and goals for international education

The *International Education Strategy 2018-2030* (the Strategy) aims to create an environment where international education can thrive and deliver economic, social and cultural benefits for New Zealand. It builds on New Zealand's quality education system and focuses on delivering good outcomes for international students, domestic students and New Zealand international education providers.

The desired outcome is **a thriving and globally connected New Zealand through world-class international education**. The three goals are:

- Excellent education and student experience
- Sustainable growth
- Global citizens

Even with COVID-19, the Strategy's goals are valid as they reflect the wider benefits that international education can deliver. However, the activities being delivered to achieve the Strategy are changing to reflect the rebuild and transformation of the sector.

Strategic Recovery Plan for International Education

After tourism, international education is the sector hardest hit by COVID-19 and subsequent border closures. The sector is currently operating with a decreasing number of international students as students who complete their studies in New Zealand are not able to be replaced. The path to recovery needs to be two-fold – re-opening the border and in the longer term, shifting to more diversified products, services and modes of delivery.

The Strategic Recovery Plan for International Education (the Recovery Plan) sets out a new international education work programme. It builds on the Strategy as a system-wide framework to address current challenges and seize opportunities. It extends the Strategy's focus to include sector resilience, reduce Crown risk and activate opportunities for innovation.

The Recovery Plan is made up of three workstreams:

- Stabilising the international education sector
- Strengthening the international education system by focusing on regulatory settings, policies and practices to support the sector's rebuild
- Accelerating the transformation of the sector

A summary of the Recovery Plan is attached in Appendix 1.

Due to the system-wide nature of the Recovery Plan, a Senior Officials Group supports its governance and implementation. This Group complements agencies' standard decision rights and reporting lines. On behalf of the Secretary for Education, ENZ convenes and chairs the Group.

ENZ and the Ministry of Education have undertaken a short, focused engagement with the sector. Their feedback is being used to inform the shaping of the Recovery Plan work programme and its sequencing.

The sector has welcomed having a plan for the recovery of international education, but many believe the sector needs more financial support. A number of providers have closed or entered into hibernation, with others concerned that they will fail due to the impacts of the border closure.

The sector is concerned about the increasing impact of the pandemic on the sector's workforce as education providers implement actions, such as retrenchment, in response to the pandemic but risk losing the capability and skills that will be needed to rebuild the sector. This could also adversely affect the pastoral care of international students who are in New Zealand if expertise in

meeting these students' specific pastoral care needs reduces.

There are varying states of readiness within the sector to embrace and transform to other modes of education delivery. The sector's focus is on when the New Zealand border will re-open to international students and that New Zealand continues to provide a safe and welcoming environment for international students. To help address this, the sector would like a positive statement of confidence from the Government about the future of international education for use offshore.

The sector also wants increased alignment between government agencies. The sector wants to know how they can participate in agencies'

work on policies and regulatory settings that would affect international education so any changes deliver the best outcomes while reducing the likelihood of any unintended consequences.

Engagement with the sector has highlighted that the Recovery Plan is likely to be only the start of the support needed to rebuild the sector. The inability of large numbers of international students to enter New Zealand for the start of the 2021 academic year will have a significant impact on the sector as students who finish their study in New Zealand are not replaced.

Cabinet had requested that you provide a report back on the finalised Recovery Plan. The Ministry of Education will provide you with this advice.



THE OPERATING ENVIRONMENT

International education is a highly competitive sector globally. Around 5.5 million international students are enrolled in higher education globally. The United States of America, United Kingdom, Canada¹ and Australia are the top English-speaking destinations. In comparison, preference for New Zealand is low with only 15% of prospective students identifying New Zealand in their top three preferred study destinations.

In response to the pandemic, some prospective international students are delaying their studies and recent research indicates that people want to travel overseas for study when they are able to. This creates opportunities for New Zealand which is seen as a safe destination and our ability to offer different ways of students gaining an international study experience without overseas travel.

Globally, usage of blended and online education delivery models has grown in response to the pandemic. This has created opportunities for organisations and businesses with the expertise and experience in delivering education in these ways. In addition, many education providers have started providing education globally via online or distance learning to maintain interest of students still interested in an overseas study experience.

New Zealand's international education sector

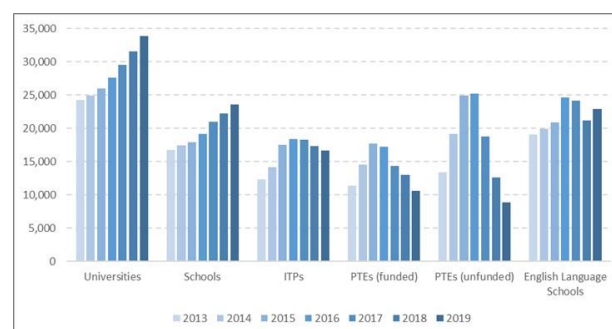
In New Zealand, the economic value generated by international education has been dominated by attracting international students to study in New Zealand. Of the estimated \$5.23 billion generated in economic value in 2019, \$4.93 billion came from international students studying in New Zealand.

Between 2016-2019, there were encouraging signs suggesting that policies and regulatory

settings changes, in addition to ENZ's promotional activities being focused on a quality education and student experience, were delivering the shifts expected by the Strategy. These included:

- moving from a focus on volume to value with fewer international students enrolled, but higher tuition fees and sector economic value
- New Zealand's regions increasingly sharing the benefits with a greater proportion of international students studying outside Auckland
- a greater proportion of international tertiary students studying at higher levels of study likely to support New Zealand's skill needs.

2013-2019 international student enrolments



Much of the sector is struggling

The impact of border closures globally on international education has been significant. New Zealand's border closure in response to COVID-19 has been the longest and most restrictive in the world. New Zealand education providers will be at a competitive disadvantage for years to come.

The decision to allow 250 postgraduate students into New Zealand to continue their studies is seen as a positive first step for the sector. This has been welcomed by the sector, but it is only a small group compared to the thousands of students who

¹ Canada's international education sector has grown significantly in recent years.

typically arrive in New Zealand to begin their studies at the beginning of the academic year.

Since the onset of the COVID-19 pandemic, the number of international students in New Zealand has continued to decline. There is likely to be 25,000-30,000 international students in New Zealand when semester one 2021 starts.²

The impact of COVID-19 has been significant across the sector. ELS and PTEs are the most affected in terms of revenue from international students. But schools and ITPs will also experience large revenue losses.

This may affect the sector's capability as some providers are retrenching and considering lay-offs which may jeopardise the ability of the sector to recover and could potentially affect the pastoral care of international students currently in New Zealand.

Due to the pandemic, some PTEs have ceased operating or are expected to cease operating with others contemplating selling or sub-leasing their premises. This would reduce their ability to deliver education to domestic and international students.

COVID-19 is creating opportunities for growth

Globally COVID-19 has had a severe impact on international education, but it is raising awareness of New Zealand as perceptions are that New Zealand has responded well to the pandemic. This creates an opportunity for New Zealand's international education sector to capitalise on the strong response. But this could be lost as some of New Zealand's competitors open their borders or signal paths to re-entry and others continue to maintain an open border.

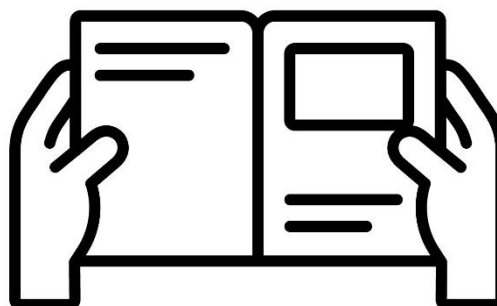
Similar to New Zealand, Australia is looking to pilot the entry of a small cohort of international students. However, the United Kingdom's border

is open with students from certain countries required to self-isolate and Ireland's border is open with all students required to self-quarantine. In addition, Canada just re-opened its border with students needing to quarantine for 14 days and providers needing to have a COVID-19 readiness plan.

You could issue a clear message to students offshore that New Zealand not only recognises the difficult position they are in, but that New Zealand is keen to welcome students to return to New Zealand when it is safe to do so.

New Zealand education products and services delivered offshore

The New Zealand businesses and organisations that deliver education products and services offshore or online can provide unique content, learning management systems, learning experiences and analytics to change the way education is delivered.



The growth of online and blended education delivery in New Zealand and overseas due to COVID-19 can help grow awareness and visibility of New Zealand's education products, services and approaches. ENZ has received information that some education technology companies are experiencing significant growth in additional users as demand for education technology solutions is rapidly increasing.

² Based on the current number of students in New Zealand, their student visa expiry dates and assuming 500 students arrive in New Zealand each month from January 2021.

INTRODUCING EDUCATION NEW ZEALAND

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

ENZ was established as a crown agent in 2011 to bring leadership and coherence to New Zealand's international education sector by supporting them to deliver on the Government's priorities for international education. We do this by chairing the Senior Officials Group to support the implementation of the Strategic Recovery Plan for International Education and engaging with the international education sector.

ENZ's "light on the hill" that we strive to achieve is the *International Education Strategy 2018-2030*.

To fulfil our purpose, ENZ works with international students, the international education sector in New Zealand and overseas, other government agencies, peak bodies, New Zealand's regions and other governments. ENZ brings the international student voice into decision-making and broader promotion of New Zealand. ENZ is also part of the [New Zealand Story](#) which works to enhance global perceptions and favourability.

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

The Ministry of Education and Ministry of Business, Innovation and Employment are our monitoring agencies and provide advice to you on our performance.

Our people

Ngā Manapou

Ngā Manapou (Principles) are the set of values that establish support, enhance and sustain the

mana of a person. They set out ENZ's culture and how we expect staff to interact with other people. Ngā Manapou represent the weaving together of how we aim to work with Ngā Mātāpono from Te Rautaki Māori of ENZ Manapou ki te Ao. Our Ngā Mātāpono are Aroha, Manaakitanga and Kaitiakitanga.

Role of our Board

As a crown entity, we are governed by a Board (profiled in Appendix 2) 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.

You are able to influence ENZ's direction through your appointments to our Board.

Our staff

Grant McPherson was appointed as the Chief Executive in 2012. The Chief Executive is supported by the Senior Leadership Team (profiled in Appendix 2).

ENZ employs approximately 90 staff spread across the world. A map of where our staff are located is provided in Appendix 4.

ENZ's offshore staff are generally co-located with other government agencies in New Zealand Embassies and High Commissions. Offshore staff leverage New Zealand's international diplomacy programmes, provide in-market support, gather market intelligence and promote 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.



WHAT EDUCATION NEW ZEALAND IS DOING

The Education and Training Act 2020 sets out ENZ's functions (refer to Appendix 3). They include promoting New Zealand education overseas, providing information to international students in New Zealand, undertaking research and providing intelligence and acting for the government in relation to international education.

ENZ's focus for the next three years

Recovery of the sector from the impacts of the COVID-19 pandemic requires a well-coordinated response.

To meet these challenges ENZ plays a key leadership role in leading and supporting the implementation and delivery of the Strategic Recovery Plan for International Education.

The 2020 Interim Letter of Expectations sets out our role in implementing the Recovery Plan. This includes ENZ chairing a Senior Officials Group which will support the governance and implementation of the Recovery Plan on the behalf of the Secretary for Education and acting as its secretariat.

Based on these expectations, we are leading the innovation workstream of the Recovery Plan which is focused on transforming the international education sector to a more sustainable state and lead the management of general consultation and engagement with providers and international students. ENZ also supports the Ministry of Education who will lead the workstream to strengthen the international education system.

In the next three years, ENZ will support:

- rebuilding the international education sector in response to the impacts of COVID-19
- transforming the sector to make it more sustainable in the long-term

- the retelling by others of the wider benefits of international education to build wider support and social licence for the sector.

ENZ is developing a new Statement of Intent and will amend its *Statement of Performance Expectations 2020/21* to reflect your priorities and outline ENZ's strategic direction and operations. Drafts of these documents will be provided to you for review and feedback.

ENZ's work in 2020/21

ENZ's focus for 2020/21 is to achieve short-term outcomes to respond to the disruption caused by the COVID-19 pandemic. As our operating environment has been undergoing constant changes due to the unprecedented impacts of COVID-19, we expect to pivot some activities to ensure that we continue to achieve our priorities and outcomes.

ENZ is funded through three Vote Tertiary Education appropriations.

Revenue and expenditure summary (\$000s)	2020/21 Budget
Revenue	
International education programmes	34,646
Tertiary scholarships and awards	3,750
Scholarships for inbound international students	300
Other revenue e.g. cost recoveries, interest	980
Total revenue	39,676
Total expenditure	39,676
Net surplus/(deficit)	-

Support for current international students and potential return of international students

ENZ provides services to international students at all stages of their student journey to ensure that they are looked after 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 International Students) Code of Practice and monitors the performance of education providers who are signatories to the Code. ENZ works closely with these agencies and others to influence the policy settings and processes to encourage and support international students currently in New Zealand to continue to stay here for further study.

We are raising awareness of the options available for students who are in New Zealand to continue their study and undertake activities over summer that would keep students connected to other international students while ensuring their pastoral care needs are catered for. We developed the Tū Ngātahi engagement programme to offer support and reassurance to international students currently in New Zealand.

[NauMai NZ](#), our student experience portal, provides consistent, relevant and accessible information for international students, via a single trusted source.

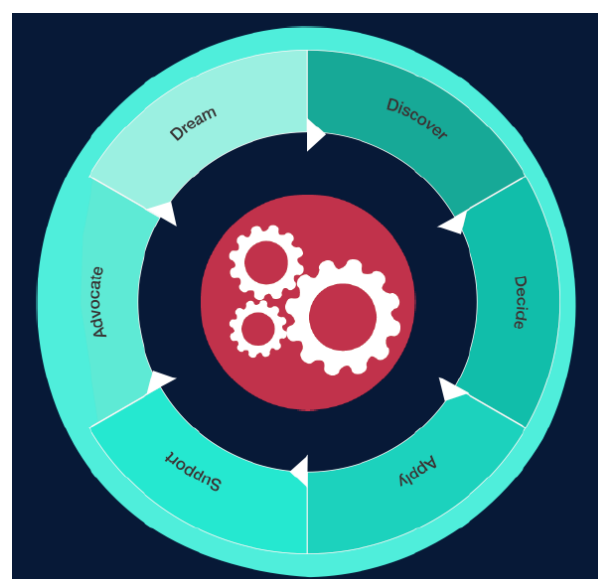
The traditional business model for ENZ and education providers has been in-bound student mobility, with some out-bound students. The eruption of COVID-19 and closure of borders have stopped this.



The Treasury's *Pre-Election Economic and Fiscal Update*³ assumed that all border restrictions would

be lifted on 1 January 2022. It also assumed limited international travel will resume in mid-2021, reflecting safe travel zones or international education resuming.

ENZ is working with the Ministry of Education to identify cohorts of international students who could be granted exemptions to the current border closure, with ENZ having received many proposals from education providers and foreign governments for managed cohort entry. In addition, ENZ is developing a pipeline of prospective international students who are committed to studying in New Zealand and will



choose to do so when they are able to.

ENZ has a world-leading database marketing programme across the entire student journey. This starts from choosing New Zealand as a study destination via our various marketing channels, through to choosing a course via the matching algorithm. It continues to track students all the way through to starting their study and then through to NauMai NZ. The range of ENZ's digital platforms allows us to target prospective and current international students with communications and information tailored specifically for them.

³ <https://www.treasury.govt.nz/system/files/2020-09/prefu20.pdf>

Innovation

As part of the Recovery Plan, ENZ is responsible for leading innovative approaches to create a transformed international education sector so that it is more diversified, resilient, and sustainable, ensuring that it continues to add value to New Zealand. This is focused on offering new modes of delivery and creating opportunities for New Zealand education to tap into new audiences. This can position New Zealand as a leader in life-long learning and innovative education, and move to future-proof the international education sector by harnessing digital capability and mitigating environmental sustainability vulnerability.

ENZ is continuing to explore opportunities to grow



and diversify where and how New Zealand international education is delivered. ENZ is taking a 'whole of New Zealand approach' to promoting education pathways that enable students to begin their study journey to New Zealand from their home country. One of the key levers to achieve this is the ENZ-led University Pathways project, an initiative to enable students to do one to two years of study in their home country and then enter any New Zealand university bachelor's degree programme. An initial partnership will be launched in November 2020.

ENZ is developing a roadmap for the development of a Unified Digital Learning Platform, establishing the foundation platform to build a community of users.

As part of this work, ENZ is also supporting Te Pūkenga to help them understand the market opportunities available for technical and vocational education and training globally and

ensure an international education perspective is reflected in their work.

Traditionally, ENZ helps 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 enable New Zealanders to enhance their skills through study overseas across a wide range of courses and locations.

ENZ has been reviewing the scholarships to maximise the benefits they deliver and ensure that they will be fit for purpose in the future. We will provide you with advice about options for your consideration.

International reputation

ENZ recognises the need to build the reputation of New Zealand's education system internationally and keep New Zealand's education brand alive in key student attraction countries. ENZ undertakes or supports Government-to-Government activities, institutional relationships and academic relationships to help improve New Zealand's reputation education-wise and global research connectivity over the long-term.

This is complemented by delivering education brand messaging through public relations, digital advertising, working with education agents and using our digital platforms and social media communities. Our student facing website www.studyinnewzealand.govt.nz promotes New Zealand to international students considering study in New Zealand.

We are also exploring how to better use New Zealand's international alumni to strengthen New Zealand's education brand.

New Zealanders support international education in New Zealand

For New Zealand to remain a warm and welcoming place for international students to study, we are working to broaden New Zealanders and other agencies understanding of the benefits of international education, particularly the social, cultural and economic benefits.

To support this work, we are developing a new strategy to create a new narrative for international education that reflects the new operating environment post COVID-19 and to improve people's understanding that international education is not just about people travelling to New Zealand for study. We recently surveyed New Zealanders to understand their current perceptions of international education and found half of respondents were enthusiastic champions for international education. While the remaining respondents had limited awareness of international education, they became strongly supportive when told about the benefits. In addition, two thirds of respondents were positive about international students returning to New Zealand by the end of 2021. We will brief you on the findings of the research and how we plan to create broader support and a better narrative for international education.

Other online platforms

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 New Zealand education
- [AgentLab](#) provides education agents with tools, training, and information to promote New Zealand and support international students in New Zealand
- [Media Centre](#) provides New Zealand and international media with access to material about international education, including stories, statistics, videos and graphics
- [Skills Lab](#) provides New Zealand international education providers with an online toolkit of projects, advice and tips on a range of topics.



APPENDIX 1: STRATEGIC RECOVERY PLAN FOR INTERNATIONAL EDUCATION

Strategic Recovery Plan for International Education

New Zealand Government

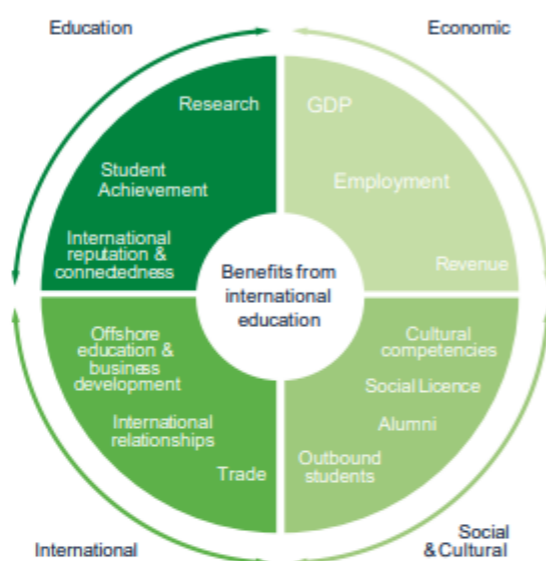
July 2020

CONTEXT

International education sector contribution to New Zealand's economy (2019)

National ranking of largest export sectors	5th
Broader economic value	\$5.23b
Enrolments	115,713
Number of jobs supported by sector	48,800
Nationalities studying in New Zealand	180

Unlocking the full value from international education



Sector outlook for the next 12 to 24 months

- The recovery plan will build on and accelerate the 2018 New Zealand International Education Strategy, developed by the government and international education sector. Its goals are to deliver an excellent education and study experience, achieve sustainable growth and develop global citizens.
- The government is investing in international education to support a future focus on; diversifying products and services by developing offshore pathways (supported by quality assurance processes), providing a single New Zealand digital platform for New Zealand programmes and keeping New Zealand's brand alive.
- New Zealand has gained international recognition for our response to and management of COVID-19 and this is a key competitive advantage we can now harness.
- New Zealand's border restrictions are likely to remain for some time and quarantine requirements will remain in place for everyone who arrives in New Zealand.
- Maintaining New Zealand's presence and relationships in markets will be more challenging, and even more important, given border restrictions and less travel between countries.
- Regional economies will continue to be significantly impacted from the loss of international students and tourists.
- Led by Education New Zealand and the Ministry of Education, the Strategic Recovery Plan for International Education will see multiple Government agencies working closely together alongside the international education sector.

FUTURE STATE

What does future state look like?

A transformed international education sector will be more diversified, resilient, and sustainable. As a sector, it will be a:

- Global international education leader, an engager and a connector helping build prosperity, safety and wellbeing.
- Key driver of economic wellbeing through providing trade links, student revenue, wider revenue and a future-proofed sector.
- Booster for regional development by matching the right students to the right places in New Zealand.

For students and education providers:



- Not all learners will be based in New Zealand because delivery to international students will be a mix of onshore, offshore, online and blended formats. Ongoing institution-level connections for science and technology development enhanced.
- New Zealand providers rankings and relevance enhanced through strategic partnerships and support from agencies.
- New Zealand education system improves on the back of international connectivity.
- We will increase the cultural competency of New Zealanders to create global citizens.

For regions and businesses:



- International students support greater economic and regional development, leading to improved outcomes for themselves and New Zealand.
- Business and investment outcomes made through New Zealand international education alumni.

For Government:



- Government agencies are focused on a core group of priority markets.
- International education supports the New Zealand government to engage with foreign governments on educational topics to improve bilateral relationships.
- New Zealand Government agencies facilitate education diplomacy through strategic use of research and academic exchange, in and out-bound scholarships and extensive people-to-people links.

Building a broader sector – with more benefits

- The sector will need to take the opportunity to not only recover but also to transform.
- The speed with which New Zealand recovers, will be commensurate with the value proposition developed, the investment into key markets and the policy decisions taken around aligning international education with value over volume.
- This work needs to be responsive to and align with the broader all-of-government and education COVID-19 work programmes.



Diversify delivery of international education products to match global market opportunities and learner expectations.

Create lifelong **international advocates** for New Zealand, our people, our products and our services.

Create **enduring relationships** between New Zealand and other countries for mutual benefit.

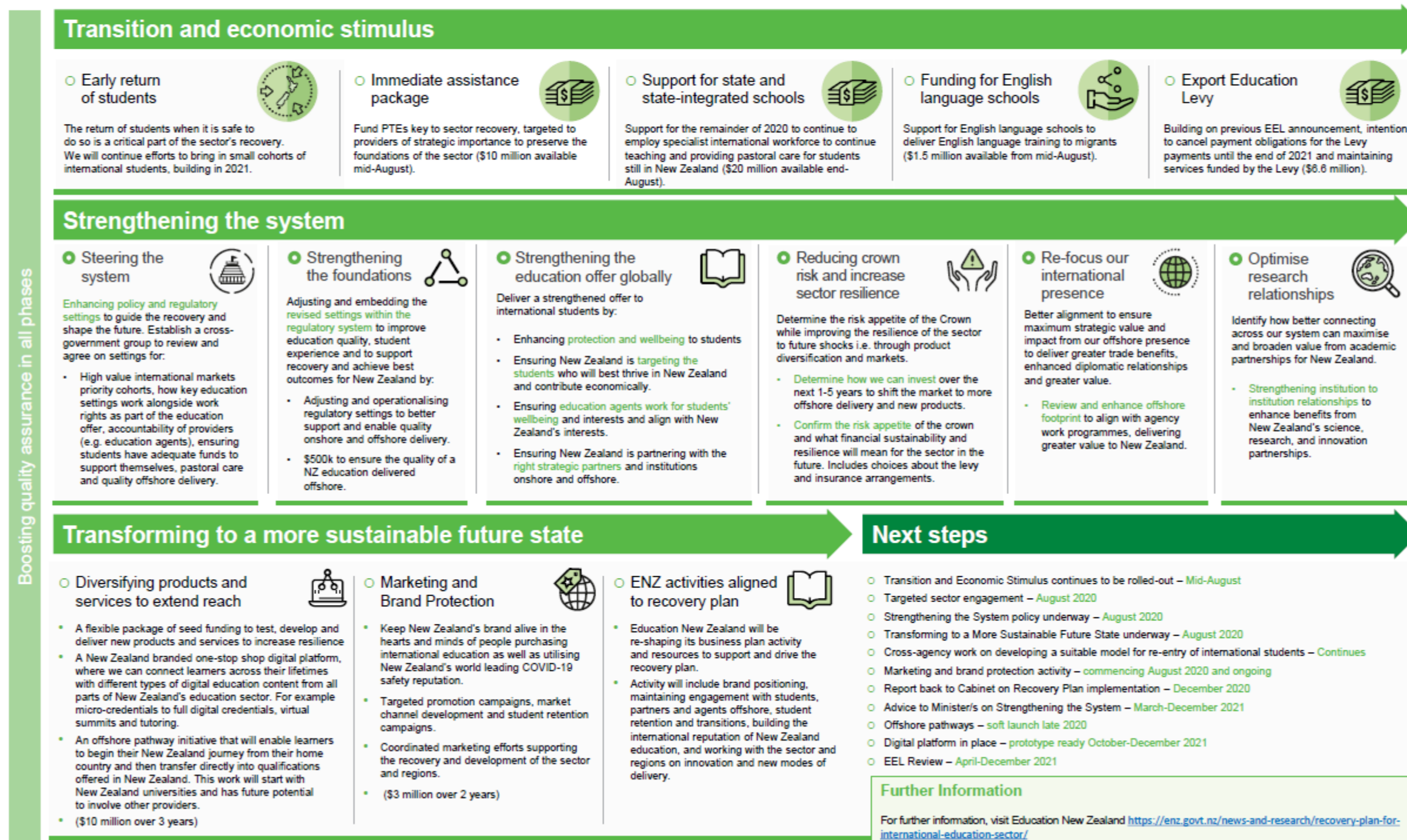
Boost regional development and New Zealanders' understanding of the value of international education

Economic wellbeing through trade links, student revenue, wider revenue and a future-proofed sector.

Strategic Recovery Plan for International Education

Recovery plan framework

The strategic recovery plan is a long-term plan to support the rebuild, recovery and reset of the international education sector. It consists of three concurrent workstreams: the immediate response is to create sector stability; the second strengthens the international education system; and the third focuses on transforming New Zealand's international education approach for a more innovative, robust and sustainable future.



APPENDIX 2: 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 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. Earlier in his career, Steve was a Senior Lecturer in Sociology and a Junior Lecturer in Business Administration at Massey University.

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 is currently a member of the International Auditing and Assurance Board. In 2016 she received the Global category award in the nationwide Women of Influence awards. In 2017, Lyn was made a Companion of the New Zealand Order of Merit for services to the State.

Dr Linda Sissons



Linda Sissons is a highly experienced chief executive in the tertiary education sector. Currently Chief Executive at UCOL, she was most recently Chief Executive at

the Primary Industries Training Organisation for

three years from 2016-19. Earlier Chief Executive roles were at Taratahi Agricultural Training Centre (2015-16), Wellington Institute of Technology (2001-15), and Hutt Valley Polytechnic (1999-2001). Dr Sissons was made a Companion of the New Zealand Order of Merit in 2006 for services to vocational education.

Victoria Spackman



Victoria Spackman is Chair of Ackama Group, a Wellington- and Melbourne-based technology company, Director of Screenrights (Australia) and co-owner

and Director of screen and visitor experience company the Gibson Group and was its Chief Executive. She was the founding Director of Te Auaha New Zealand Institute of Creativity at WelTec and Whitireia Polytechnics.

Ms Spackman's other governance experience includes committee member of FirstBoards, a working group of the Institute of Directors which encourages high quality governance in small to medium enterprises and new companies, 12 years with Bats Theatre and the Screen Production and Development Association. Ms Spackman holds qualifications in arts and law from Victoria University of Wellington.

In 2012, she was awarded the LexisNexis Private Sector In-House Lawyer of the Year. In 2015 she received the Arts and Culture category award in the nationwide Women of Influence awards. In 2016, Ms Spackman was made an Officer of the New Zealand Order of Merit for services to theatre, film and television.

Rachael Tuwhangai



Rachael is Managing Director of Māori and Pasifika Support Services, a privately owned multi-service agency which aims to positively transform the lives of individuals, families

and organisations through a range of culturally responsive support services. She is also Managing Director of Niu Digital, an app and web development company.

Rachael has previously served on the board of NZQA and is a current Member of Council for Manukau Institute of Technology. She continues to serve on a number of not-for-profit boards such as Man Alive and the Auckland Community Law Centre.

Rachael has extensive education experience in both English and Māori-medium settings including kura and wharekura, secondary and tertiary teaching, and prison education. She is currently appointed as Governance Facilitator working on the build of New Zealand's first purpose-built Māori-medium campus, Te Putahi Māori o Manurewa, which includes kohanga reo, kura, wharekura and adult education. She was a former Lecturer in Education at the University of 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. Daniel also has a very good understanding of a range of markets and marketing approaches, having

overseen a 40% increase in international student numbers since joining Nayland College.

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.

Shruthi Vijayakumar



Shruthi has joined the ENZ Board for 12 months as part of the New Zealand Institute of Directors' Future Directors Programme.

She is passionate about building ethical leaders and education's role to address our world's environmental and social issues. Shruthi currently runs her own coaching and facilitation business, is a co-founder of Emerge Institute and teaches at AUT. She has previously led operations for Better World Ed, a global education start-up and led climate innovation and impact programmes with the European Union and various universities.

Shruthi received an MBA from the University of Oxford, has been recognised as a Global Shaper by the World Economic Forum, and was a semi-finalist for the Young New Zealander of the Year Award.

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 New Zealand Trade and Enterprise (NZTE), following extensive experience as Regional Director, South/South East Asia and Group General Manager, Business Solutions on the NZTE Leadership Team.

Fiona Cameron | Director, People and Culture, Property and Legal

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 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.

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 New Zealand Embassy in Berlin, and three years as First Secretary and Consul at the New Zealand Embassy in Santiago. She is a trained television director and a graduate of the University of Otago and the University of Auckland.

John Goulter | General Manager, Stakeholders and Communications

John has broad experience in government relations, issues management and public affairs, having worked for organisations including Inland Revenue, Telecom NZ, and the Earthquake Commission, and as chief press secretary in the Prime Minister's Office. Formerly a journalist, John spent several years working in the Parliamentary Press Gallery as a political editor.

Paul Irwin | General Manager, Partnerships and Marketing

Paul joined ENZ from advertising agency FCB Wellington, where he led the Wellington office for almost five years. He has extensive experience in marketing strategy, digital marketing, international marketing and team management.

Paul also worked for The Economist in London and then Asia, setting up the marketing department in Singapore. Throughout his career Paul has worked with numerous government clients and other organisations such as Forest and Bird, Public Trust and Fairfax Media.

Matt Penney | Chief Financial and Information Officer

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

APPENDIX 3: EDUCATION NEW ZEALAND'S 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 4: MAP OF ENZ LOCATIONS



APPENDIX 5: GLOSSARY

ELS	English language schools
ENZ	Education New Zealand
International students	International students are non-residents of New Zealand and have expressly entered New Zealand with the intention of study or have enrolled with a New Zealand provider offshore. ENZ counts international PhD students, exchange students, NZ Aid students, foreign research postgraduate students and full fee-paying international students as international students
ITPs	Institutes of technology and polytechnics
MBIE	Ministry of Business, Innovation and Employment
MFAT	Ministry of Foreign Affairs and Trade
MoE	Ministry of Education
NZ Inc	The collaboration of New Zealand government agencies, particularly when operating offshore. This includes agencies such as ENZ, Immigration New Zealand, Ministry of Foreign Affairs and Trade and New Zealand Trade and Enterprise
NZQA	New Zealand Qualifications Authority
PTEs	Private training establishments
Recovery Plan	The Strategic Recovery Plan for International Education
TEC	Tertiary Education Commission
The Strategy	The <i>International Education Strategy 2018-2030</i>