

Education New Zealand

E.48 (2020)

Annual Report for
the year ended
30 June 2020

Pūrongo ā-Tau mō
te tau i mutu i te
30 o Pipiri 2020

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In accordance with the Crown Entities Act 2004, we approve this Annual Report on behalf of Education New Zealand’s Board.



Steve Maharey | Board Chair
17 December 2020



Lyn Provost | Deputy Chair
17 December 2020

BOARD CHAIR'S FOREWORD

In last year's Annual Report, Education New Zealand (ENZ) spoke of changes in play to re-align the country's international education sector to ensure it is focused on value, long-term economic and environmental sustainability and New Zealand's cultural, social and educational aspirations.

Little did anyone know of the disruption that was about to appear on our horizon. COVID-19 has totally changed international education, both in the short-term and in ways that will change what we do for the foreseeable future.

Our task is to help the sector recover and rebuild for the better. The changes prefigured in the *International Education Strategy 2018-2030* give us a strong platform to start from.

KUPU TAKAMUA A TE MANUKURA

ENZ is the government agency that leads the future thinking on New Zealand's international education delivery, while supporting the sector through brand, marketing, business capability and international representation.

Clearly, the impact of COVID-19 has required an immediate re-think. As an immediate response, ENZ looked at all its operations and formed a response plan to stabilise and guide the international education sector towards recovery. ENZ's role and direction has changed to focus on shaping the future of leading education and education delivery in the post COVID world as well as continuing to focus on the early return of students when the time is right.



ENZ's Board members as at 30 June 2020 (Left to right): Victoria Spackman, Rachael Tuwhangai, Lyn Provost, Chair Steve Maharey, Future Director Shruthi Vijayakumar, Daniel Wilson and Linda Sissons. Their biographies are included in Appendix Three.

Globally, the whole international education sector has been working out how to navigate the crisis and plan for the future.

To position New Zealand as a leader in a post COVID world we have had to front long-term challenges and explore what's required to navigate a world changing radically, and fast.

The *International Education Strategy 2018-2030* embodies our objectives and direction. The Strategic Recovery Plan for International Education (the Recovery Plan) was launched to rebuild the international education sector and address the impacts and major challenges affecting the sector due to the eruption of COVID-19.

The challenge for New Zealand is to stay a step ahead, to adopt a broader view of international education and its contribution, while supporting providers, students and education business through tough and demanding times.

For some time now, we have been building a future that is much more than the attraction of students to New Zealand. It has to include blended, online and trans-national opportunities. Done well, it has so much to offer to New Zealand.

We know the sector will emerge very differently. We also know we will have to take New Zealanders with us. International education has a lot to offer to the country – economically, socially and educationally – but when so many sectors are competing for resources and focus, we have to make international education relevant and compelling. We must grow public belief in a new future for international education.

It is a big task, but I am confident that ENZ is up to it. ENZ will continue to support international education in New Zealand and will continue to promote New Zealand as a study destination to support the future delivery of a healthy and, once again, vibrant sector.



Steve Maharey | Board Chair

CHIEF EXECUTIVE'S FOREWORD

KUPU TAKAMUA A TE MANUTAKI

Education New Zealand is an organisation facing and shaping huge change.

Due to COVID-19, the international education sector can no longer rely on previously expected numbers of globally mobile learners seeking a quality education for a variety of reasons. In early 2020 international education providers had to change course abruptly.

ENZ quickly grasped that it had to create a more agile, flexible and sustainable platform for international education – in an environment that was totally new to the sector.

To immediately address the impacts and challenges affecting the international education sector we reprioritised our resources and refocused our initiatives to stabilise international education. We have had to move quickly to ensure that our work and targeted engagement supports change in New Zealand by driving the COVID-19 response to support the recovery and transformation of international education over the coming years.

ENZ recognised early that the return of international students to New Zealand is vital to re-starting and re-invigorating international education and is a central pillar of the Recovery Plan, and the broader recovery of the New Zealand economy.

As a response we have undertaken immediate work to progress the early return of students with other education agencies as well as with health, managed isolation and quarantine, and economic agencies to ensure the return of international students remains visible and a viable option when the time is right.

Part of the work ENZ has been undertaking with providers, sector representatives and other government agencies has been to support the

international sector to start building a different business model, that in time will generate increased economic, social and cultural value to New Zealand.

As the COVID-19 crisis developed, we quickly learned that more than ever, government agencies must work effectively together. This is critical as globally, providers are adapting fast, offering new services and tools and growing delivery options.

Our immediate priority was to stabilise the sector, to enable transformation and stability. This included a number of projects to begin to co-design a new landscape for the sector. Examples include the rapidly established Future Focus Programme to help the sector to rethink international education and develop new programmes, products, services and modes of delivery.

We also quickly developed and put in place the International Student Hardship Fund which supported international students in temporary hardship through a critical period. We utilised the NauMai NZ online platform to help ensure that international students in New Zealand had access to good, reliable information and felt connected to each other throughout the difficult period we have all been experiencing.

ENZ has worked with other agencies to ensure opportunities can be unlocked within the international education sector in a post COVID-19 world. That will continue to be a strong focus for the coming year.

ENZ's data analysis and intelligence can help underpin the sector's strategies and interventions for international education, including work on

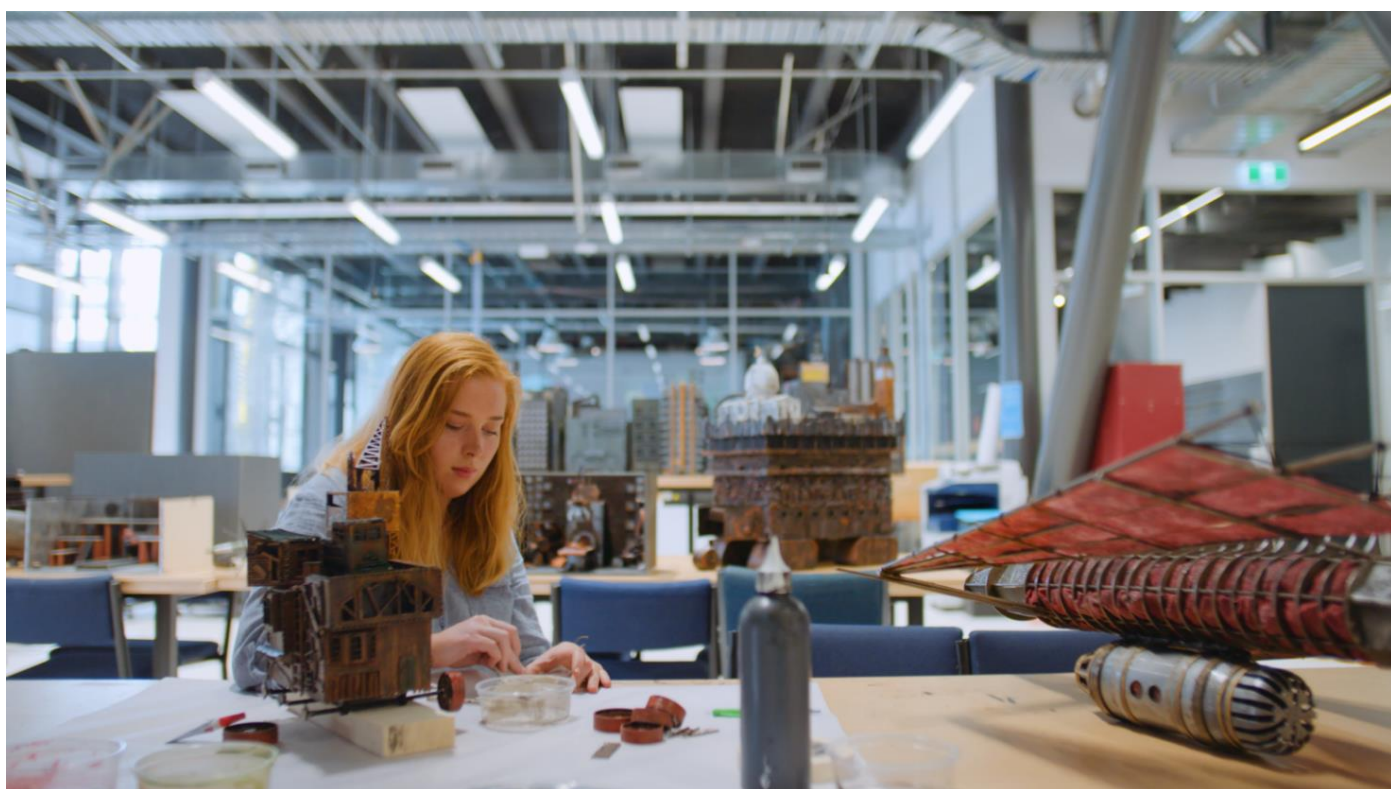
diversification of markets, programmes and products to extend reach and enable providers to deliver offshore.

Our environment remains extremely challenging, but we believe we are making progress.

We are working to support and facilitate a transformed sector that has the potential to re-emerge with a robust, sustainable and high-quality industry for the benefit of all New Zealand and New Zealanders.



Grant McPherson | Chief Executive



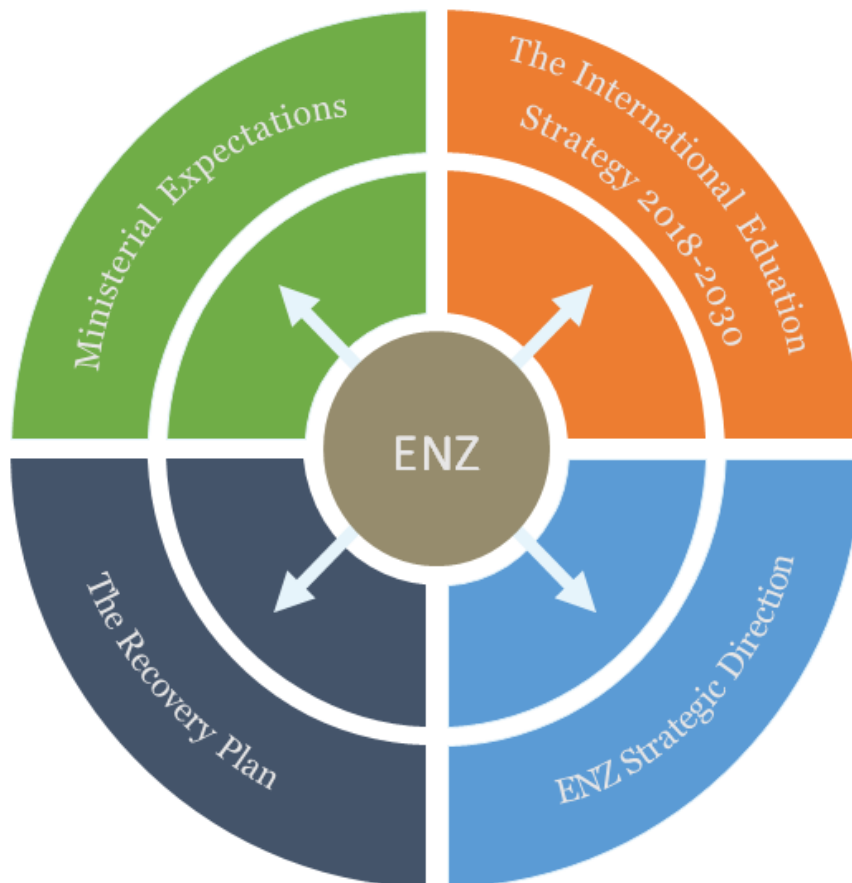


PART A - ENZ STRATEGIC DIRECTION

WĀHANGA A - AHUNGA RAUTAKI A MANAPOU KI TE AO

This section outlines our outcomes and indicators we use to measure progress toward ENZ’s overall outcome. We describe how we have responded to the impacts of COVID-19 on the international education sector, how it changed our strategy and the work we did to strategically support the sector. We touch on the funding that provided the platform for achieving these impacts.

Our detailed priorities for 2019/20 are outlined in ENZ’s *Statement of Intent 2019-2023* and *Statement of Performance Expectations 2019-2020*. Our Outcomes Framework for 2019/20 is shown on page 17.



THE INTERNATIONAL EDUCATION SECTOR

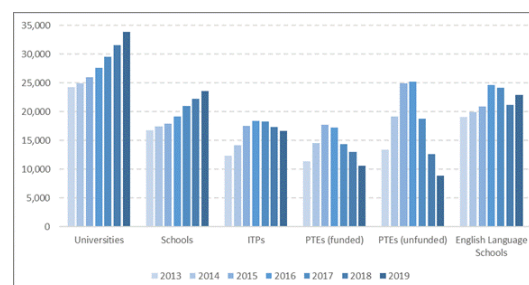
Before the eruption of the COVID-19 pandemic, international education was New Zealand's fifth largest export sector.

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 2019¹, \$4.93 billion was 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 designed to be delivered by the *International Education Strategy 2018-2030*. 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.

KŌRERO MŌ TE RĀNGAI MĀTAURANGA KI TE AO



2013-2019 international student enrolments

International students enrolled with New Zealand providers

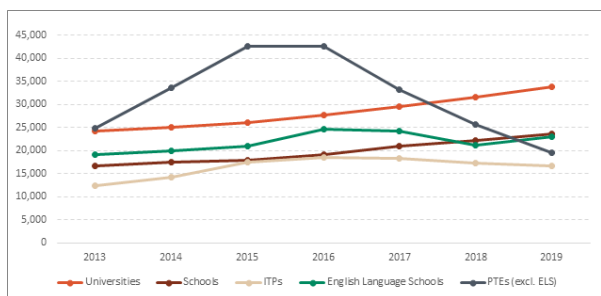
In 2019, international education contributed \$5.23 billion to the New Zealand economy, a 6% increase from \$4.94 billion in 2018. In 2019, 115,713 international students were enrolled with New Zealand providers, a 1% decrease compared to 2018.

The decrease in international student enrolments was driven by decreases in the number of international students at private training establishments unfunded (down 30%) and funded² (down 18%) and institutes of technology and polytechnics (down 4%).³ These have been offset by increases at universities (up 7%), English language schools (up 8%) and schools (up 6%).

¹ This report includes calendar year and financial year information. With the exception of the Annual Financial Statements, dates such as 2019/20 refer to the financial year while dates such as 2019 refer to the calendar year. All information in the Annual Financial Statements refer to the financial year.

² Funded private training establishments receive funding from the New Zealand government for domestic tertiary students while unfunded private training establishments do not receive government funding for domestic students

³ More detailed information about 2019 international student enrolments is available on [IntelliLab](#).



Number of international students enrolled with New Zealand providers, 2013-2019

Funded private training establishments receive funding from the New Zealand government for domestic tertiary students while unfunded private training establishments do not receive government funding for domestic students

Four markets, (Japan, India, Viet Nam and China) of the top 10 target markets recorded increased enrolments in 2019.

In the top ten countries Japan had the largest increase in student numbers from 2018 to 2019 (up 12%), followed by India (up 2%), Viet Nam (up 10%) and China (up 1%). China and India accounted for 47% of all international student enrolments. Our priority markets were Brazil, Chile, China, Colombia, European Union, India, Indonesia, Japan, Republic of Korea, Malaysia, the Philippines, Saudi Arabia, Thailand, United States of America and Viet Nam.

The rapidly changing global picture due to COVID-19

International education has been building a global network of New Zealand-educated graduates who are powerful advocates for New Zealand and its values. It has historically made significant contributions to New Zealand socially, economically and culturally by contributing to regional development, international diplomacy initiatives, tourism and New Zealand’s talent pool.

Education has been a rapidly changing field with increasingly flexible programmes and modes of even before the large-scale disruption caused by the COVID-19 pandemic.

Due to the unprecedented impact of the COVID-19 pandemic on international education, 2019/20 was a year bringing recessionary impacts in New Zealand education markets. Faced with the

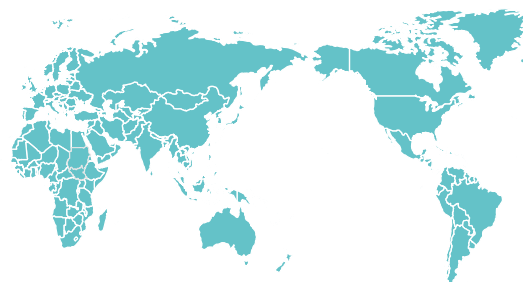
unfamiliar, the sector and global markets have been undergoing rapid changes, experiencing adverse financial circumstances as the pandemic affects their livelihoods, causing multi-year reductions in the number of international students in New Zealand.

New Zealand’s international education sector effectively came to a halt in early 2020. The path back to recovery is two-fold, re-opening borders and, longer terms shifting to more diversified products, service and modes of delivery. ENZ’s challenge is to work with the sector and other government agencies to build a credible path to recovery.

Adapting to this future depends on the sector’s ability to explore different perspectives to be able to deliver education services to international students through various forms of transnational education. Recovery of the international education sector requires a dynamic and well-coordinated response to provide assurance and reinforce confidence in the sector.

The New Zealand picture

International education brings people together from around the world to share ideas, global skills and knowledge, and in doing so creates a solid network and friendships between New Zealand and other countries’ governments and education providers.



New Zealand needs to ensure that it continues to offer an excellent education and student experience, and that it provides a distinctive point-of-difference to the other education choices available globally.

In 2019, international education was New Zealand's fifth largest export industry. However, all of New Zealand's key student attraction markets are directly impacted by the COVID-19 outbreak and border closures, resulting in a significant reduction in student volumes and in the revenue generated from tuition fees. To be able to successfully restore and build a resilient international education sector and protect it from future shocks, the sector needs the continued support and buy-in of New Zealanders. This will help New Zealand improve student outcomes and maintain a reputation for being a welcoming place for international students.

New Zealanders studying offshore

International education includes New Zealanders having a chance to have offshore study opportunities and travelling the world to enhance their international skills through a period of study or internship.

The Prime Minister's Scholarships for Asia and Latin America is a government initiative providing



support for New Zealand students to experience study overseas. In 2019/20 we continued to administer both scholarships and supported

scholarship recipients to return to New Zealand in response to the COVID-19 pandemic. These scholarships funded 254 New Zealand students to enhance their international skills through a period of study or internship in those regions.



WHO WE ARE AND WHAT WE DO

KO WAI MĀTOU, HE AHA Ā MĀTOU MAHI

ENZ is charged by the Government to work to secure a vibrant, healthy international education sector

We are a Crown Agency solely focused on international education. ENZ works toward a single purpose, taking New Zealand's education experiences to the world for enduring economic, social and cultural benefits. To do this, we give effect to the Government's goals for international education⁴ by providing a range of targeted services such as marketing, promotion and overseas representation. The Ministry of Education and the Ministry of Business, Innovation and Employment are our monitoring agencies.

ENZ staff in New Zealand are based in Auckland, Wellington and Christchurch. Offshore we have staff in Brazil, Chile, China, Germany, India, Indonesia, Japan, Republic of Korea, Saudi Arabia, Singapore, Taiwan, Thailand, the United States of America and Viet Nam. The offshore staff are mostly co-located with the Ministry of Foreign Affairs and Trade or with New Zealand Trade and Enterprise.



ENZ's offshore staff works on and participates in New Zealand education fairs, organises New Zealand's participation in commercial education fairs and works with PR agencies to promote New

Zealand education as well as strengthening New Zealand's bilateral education relationships with other governments and education providers.

Who we work with

We work with international education providers, including tertiary education organisations, English language schools, schools and organisations that export education services⁵. We also work with education agents.

To achieve our priorities and respond to the impacts of COVID-19, ENZ has continued to collaboratively work with other international education and sector agencies such as the Ministry of Education, the Ministry of Business, Innovation and Employment (including Immigration New Zealand), the Ministry of Foreign Affairs and Trade, the New Zealand Qualifications Authority, the Tertiary Education Commission and the New Zealand Trade and Enterprise, including the Government to Government office.

ENZ proactively provides services to international students at all stages of their student journey. Our work with education providers, student groups, local government, government agencies and community groups ensure that international students in New Zealand are well looked after and have an excellent student experience. This work was particularly important in responding to the impact of COVID-19 on international students in New Zealand and those students unable to come due to border closures.

⁴ The Government's goals for international education are set out in the *International Education Strategy 2018-2030*. Our statutory functions are shown in Appendix One.

⁵ These organisations include publishers, consultancy services and education technology businesses.

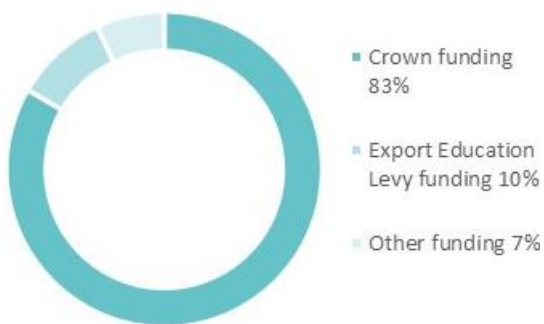
ENZ provides support to New Zealand students to have offshore study opportunities that help develop their international skills by administering the Prime Minister's Scholarship for Asia and Latin America. This year, we worked with



scholarship recipients and their New Zealand education providers to support recipients where their scholarship was disrupted by social unrest where they were studying or by the COVID-19 pandemic.

The funding we utilised

ENZ delivers its activities through \$36.090 million funding which mostly comes from the Crown through Vote Tertiary Education.



In 2019/20, 10% of our funding was provided by the Export Education Levy, which is administered by the Ministry of Education.⁶ To effectively respond to the effects of the COVID-19 pandemic, ENZ reallocated some of the 2019/20 Levy funding to support the sector and various

international education markets. Our funding supported the following initiatives:

- promotional and marketing activity for the New Zealand education brand
- professional and institutional development
- research and resource development, including market intelligence and brand health research
- the International Student Hardship Fund.



⁶ Further information about the activities funded by the Levy are set out in the Export Education Levy Annual Reports

<https://www.educationcounts.gov.nz/statistics/international-education/international-students-in-new-zealand>



OUR STRATEGIC DIRECTION

TĀ MĀTOU AHUNGA RAUTAKI

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

We support the Government's goals for building a productive, sustainable and inclusive economy and improving the wellbeing of New Zealanders and their families. Our outcome contributes to the Government's goals for social and cultural participation, wellbeing and economic prosperity and growth.

International education delivers economic, social and cultural benefits for all of New Zealand. To achieve those benefits, it needs to continue to focus on delivering excellent education and student experience outcomes for international students and global opportunities for domestic students and education providers.

International Education Strategy 2018-2030

The *International Education Strategy 2018-2030* describes New Zealand's ambitions and what each international education agency, including ENZ, will do to achieve them. It drives ENZ's organisational strategy and our work with the New Zealand international education sector.

How the COVID-19 pandemic influenced our strategic direction

To keep up and get ahead of the ongoing impacts of the unprecedented change due to the COVID-19 pandemic occurring within the international sector, ENZ began to renew its strategies and work priorities to contribute to development of a cohesive and robust approach to stabilise and aid the international education sector.

Throughout the year, the international education sector has continued to change but our objective remains constant, to ensure that New Zealanders

benefit from what New Zealand's international education activities provide. Our new direction is focused on the development of a flexible, diverse and resilient sector that is agile, self-sustainable and is able to respond to changing needs

In early 2020, ENZ commissioned a response strategy and medium to long-term recovery plan built around stabilising, transforming and growing the sector. The Strategic Recovery Plan for International Education (the Recovery Plan, agreed by Cabinet on 22 June 2020, sets out a new international education work programme by building on the vision and objectives of the *International Education Strategy 2018-2030*. ENZ and the Ministry of Education are jointly responsible for achieving its outcomes.

New Ministerial expectations

To stay ahead of the changing education and economic landscape, ENZ needs to be flexible to ensure that both government priorities and current labour market needs will be reflected in our work from 2020/21.

The new ministerial expectations outline our role and focus on key drivers that will deliver the greatest impact throughout the international education sector. ENZ will play a key leadership role in leading and supporting the implementation of the Recovery Plan to achieve a high quality and sustainable international education sector. We will also lead the management of general consultation and engagement with providers and international students.

International education is a major contributor to:
 Build a productive, sustainable and inclusive economy
 Improve the wellbeing of New Zealanders and their families



OUTCOME New Zealand international education activities provide enhanced social, cultural and economic benefits

IMPACTS

International students' perceptions of education quality are increased
 International students have a positive experience

Economic value from international education is increased
 Economic value per international student is increased
 Percentage of international students in the regions is increased
 Percentage of the sector's economic value from the top two markets is decreased

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

OUTPUTS

Position New Zealand's distinctive education brand for quality and value

Encourage innovation and diversification for long-term, sustainable growth

New Zealanders understand and embrace the benefits of international education
 Stronger global connections, research links and partnerships

STRATEGIC PRIORITIES



Promote an excellent education and student experience



Grow sustainable international education



Develop global citizens

Lead international education thinking

PART B - OUR PERFORMANCE STORY

In this section we tell our performance story. Our performance story is structured around the four strategic priorities described in ENZ's *Statement of Intent 2019-2023* and *Statement of Performance Expectations 2019-2020*. We describe what we did, how we did it and what we delivered.

We describe performance against the impact measures and priorities set at the beginning of the year. Due to the unprecedented impacts of COVID-19, we did not always achieve the objectives and standards that we set. In those

WĀHANGA B - Ā MĀTOU KŌRERO WHAKATUTUKI MAHI

areas we explain how some of our functions and focus changed, what we have achieved instead and what we are doing to address this.

We demonstrate clear links between the delivery of our stated objectives in the *Statement of Intent 2019-2023* and the annual deliverables depicted in the *Statement of Performance Expectations 2019-2020*. We also describe the progress made during 2019/20 on aspects of our organisational health and capability.



OUR ACHIEVEMENTS

Ā MĀTOU TUTUKINGA

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

What we aimed for during 2019/20

ENZ worked towards an outcome of 'New Zealand international education activities provide enhanced social, cultural and economic benefits' and contributes to the Government's goals for the social and cultural participation and wellbeing, and economic prosperity and growth.

In the context of COVID-19 and its severe ongoing impacts on the international education sector, ENZ pivoted to support the Government's response and aid the recovery of the international education sector. This was necessary to ensure that excellent education and student experience outcomes are achieved for international students and global opportunities are maintained and created for New Zealand education providers.

To meet these increased challenges, our purpose was focused on the development and implementation of a three-phase medium to long-term strategy to stabilise, transform and grow the international education sector, and secure it for long-term transformation and a return to future growth.

ENZ's immediate priority was to stabilise the sector by developing a cohesive and robust approach based on the following four key levers:

- To protect – embodying our value of Kaitiakitanga
- To prepare – to lay the groundwork for the rebuild of our sector
- To position – ensuring that New Zealand's brand reputation remains visible
- To promote – returning to marketing activity.

As a part of wider COVID-19 strategy and stream of ongoing engagement, this approach was socialised with the wider sector, peak bodies and associated groups to lay the foundations for change and development of a recovery plan to support the sector rebuild from the impacts of the COVID-19 pandemic.

We also developed high level strategic advice to the sector to ensure that international students were protected and well informed about New Zealand's response. This included the co-creation of strategic interventions targeted at the wider international education sector to support recovery from the impacts of the COVID-19 pandemic.

Our interventions to aid the recovery of the international markets and sectors

International education globally and in New Zealand has been adversely affected by the COVID-19 pandemic. It has changed the world and our sector. In response, ENZ reconfigured its work programme for the remainder of 2019/20 to implement new initiatives to connect with international students in New Zealand and gather intelligence about the markets for New Zealand providers.

Throughout the year, the international education sector has continued to change but our objective remains constant, to ensure that New Zealanders benefit from what New Zealand's international education activities provide. Our aim is to create a more agile sector that is able to respond to

changing needs. Our new direction is focused on developing a new, flexible, diverse and resilient platform for international education.

Recovery of the international education sector requires a dynamic and well-coordinated response to provide assurance and reinforce confidence in the sector.

ENZ continued to participate in a range of global forums to maintain New Zealand's education brand and our relationships with other agencies. We also developed synergistic ways to engage and reinforce our relationship with our stakeholders.

Several aspects of our work are central to the changes in the approach being taken to strengthen worldwide cooperation and build capability that can cope with the aftermath of COVID-19. To achieve this outcome, we continued to investigate what is required to navigate the sector which is changing at an ever-increasing rate, addressing COVID-19 related issues that have arisen in the international education sector and proactively enabling the

development and delivery of fit-for-purpose and cost-effective services.

ENZ invested into a range of new initiatives that have the potential to become key levers to aid the international education sector. This included the Future Focus Programme which provides oversight to effectively support and build a resilient and sustainable international education sector post COVID-19, as well as work to support international student wellbeing through the International Student Hardship Fund.

Lead international education thinking

This was a year of transition. With the changing education and economic landscape throughout the year, we needed to remain agile and flexible to ensure that Government priorities were reflected in ENZ's work.



What we did before the COVID-19 pandemic

Education Work Programme

We continued to work with New Zealand government agencies to support the Government's Education Work Programme, which included work on the Reform of Vocational Education⁷ and continued delivery of the *International Education Strategy 2018-2030*

International Education Strategy 2018-2030

All of ENZ's work during 2019/20, including our ongoing response to the COVID-19 pandemic, contributes to achieving the goals of the *International Education Strategy 2018-2030*.



Reform of Vocational Education

In August 2019, the Government announced its decision on the Reform of Vocational Education to create a more sustainable, future-focused vocational education system for New Zealand. Our goal has been to ensure that the international education voice is heard with the delivery of continued support for New Zealand vocational education and also providing strong broader global marketing and industry expertise to maximise the potential of the nationwide approach for international education.

ENZ assisted with the public announcement and worked closely with the Te Pūkenga / New Zealand Institute of Skills and Technology Establishment Board.

We worked closely with institutes of technology and polytechnics (ITPs) at an individual and sector level to grow international education value.

Te Pūkenga (New Zealand Institute of Skills and Technology)

ENZ supported the creation of Te Pūkenga which presented a significant opportunity for sector transformation and leveraged international opportunities of the reformed vocational education sector. Along with engaging with Te Pūkenga to develop a long-term marketing position for New Zealand vocational education, ENZ also worked with international directors from ITPs to support the international performance of the sub-sector during the transition period.

ENZ led the development of the Te Pūkenga website, www.vocationaleducation.ac.nz, modelled on www.studyinnewzealand.govt.nz. The new Te Pūkenga website went live with ENZ's support on 2 April 2020. Integrating ENZ's digital ecosystem with Te Pūkenga ensured the best possible customer journey for international students whilst leveraging previous crown investment.

⁷ More information about the Education Work Programme is available at <http://www.education.govt.nz/our-work/changes-in-education/education-work-programme/>

ENZ cross agencies work and initiatives

We work with New Zealand government agencies to influence policies and settings that affect the international education sector and to promote government to government relationships that support international collaboration and partnerships.

Joint work with Immigration New Zealand

To support the international education sector with the goal of aligning market strategies and improving student outcomes, in early 2019, ENZ and Immigration New Zealand agreed to a Joint Work Programme

Following engagement around ENZ's priority markets, the agencies aligned approaches for ENZ's regional activity plans in several markets for the January to June 2020 period. This included promotional or market development strategies and a New Zealand schools scholarship initiative. Other highlights include the joint development of a first-time student visa application checklist which was published on Immigration New Zealand's website and various digital platforms.

What we did in response to the COVID-19 pandemic

The unparalleled challenges due to COVID-19 required us to develop initiatives enabling the sector in transitioning to a different business model to continue to generate increased economic, social and cultural value to New Zealand.

Rebuilding the sector requires both strategic and creative development. To achieve this, we worked collaboratively with other New Zealand government agencies to support and stabilise the international education sector.

To successfully deliver the goals of the *International Education Strategy 2018-2030* for

the benefit of New Zealand a sustainable long-term approach is needed. During the second half of the financial year we started to explore ways of strategically lifting the sector and developing ENZ's new approach.

The Recovery Plan

ENZ and the Ministry of Education led the development of the Strategic Recovery Plan for International Education with a group of senior officials from international education agencies⁸. The Recovery is focused on resetting and rebuilding a more diverse, resilient and sustainable sector. The Recovery Plan includes three streams of work:

- transition and economic stimulus
- strengthening the current international education system
- transforming to a more sustainable future state.

On the behalf of the Secretary of Education, ENZ will lead the governance of the senior officials group overseeing the implementation of the Recovery Plan. ENZ will also lead the implementation of the 'Transforming to a more sustainable future' workstream and support the Ministry of Education who will lead in strengthening the current international education system.

The Recovery Plan is shown on the next page.

⁸ The international education agencies all contribute to the delivery of the Recovery Plan and are ENZ, Ministry of Business, Innovation and Employment (including Immigration New Zealand), Ministry of Education, Ministry of Foreign

Affairs and Trade, New Zealand Qualifications Authority and Tertiary Education Commission.

The Recovery Plan

Te Mahere Whakaora






New Zealand Government
July 2020

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.





Transition and economic stimulus

- 
Early return of students
 The return of students when it is safe to do so is a critical part of the sector's recovery. We will continue efforts to bring in small cohorts of international students, building in 2021.
- 
Immediate assistance package
 Fund PTEs key to sector recovery, targeted to providers of strategic importance to preserve the foundations of the sector (\$10 million available mid-August).
- 
Support for state and state-integrated schools
 Support for the remainder of 2020 to continue to employ specialist international workforce to continue teaching and providing pastoral care for students still in New Zealand (\$20 million available end-August).
- 
Funding for English language schools
 Support for English language schools to deliver English language training to migrants (\$1.5 million available from mid-August).
- 
Export Education Levy
 Building on previous EEL announcement, intention to cancel payment obligations for the Levy payments until the end of 2021 and maintaining services funded by the Levy (\$8.6 million).

Strengthening the system

- 
Steering the system
 Enhancing policy and regulatory settings to guide the recovery and shape the future. Establish a cross-government group to review and agree on settings for:
 - High value international markets priority cohorts, how key education settings work alongside work offer, accountability of providers
 - Regulatory settings to better support and enable quality onshore and offshore delivery.
 - \$500k to ensure the quality of a NZ education delivered offshore.
- 
Strengthening the foundations
 Adjusting and embedding the revised settings within the regulatory system to improve regulation quality, student experience and to support recovery and achieve best outcomes for New Zealand by:
 - Adjusting and operationalising regulatory settings to better support and enable quality onshore and offshore delivery.
 - \$500k to ensure the quality of a NZ education delivered offshore.
- 
Strengthening the education offer globally
 Deliver a strengthened offer to international students by:
 - Enhancing protection and wellbeing to students
 - Ensuring New Zealand is targeting the students who will best thrive in New Zealand and contribute economically.
 - Ensuring education agents work for students wellbeing and interests.
 - Ensuring New Zealand is partnering with the right strategic partners and institutions onshore and offshore.
- 
Reducing crown risk and increase sector resilience
 Determine the risk appetite of the Crown while improving the resilience of the sector to future shocks i.e. through product diversification and markets.
 - Determine how we can invest over the next 1-5 years to shift the market to more offshore delivery and new products.
 - Confirm the risk appetite of the crown and what financial sustainability and resilience will mean for the sector in the future. Includes choices about the levy and insurance arrangements.
- 
Re-focus our international presence
 Better alignment to ensure maximum strategic value and impact from our offshore presence to deliver greater trade benefits, enhanced diplomatic relationships and greater value.
 - Review and enhance offshore footprint to align with agency work programmes, delivering greater value to New Zealand.
- 
Optimise research relationships
 Identify how better connecting across our system can maximise and broaden value from academic partnerships for New Zealand.
 - Strengthening institution to education benefits from New Zealand's science research and innovation partnerships.

Transforming to a more sustainable future state

- 
Diversifying products and services to extend reach
 - A flexible package of seed funding to test, develop and deliver new products and services to increase resilience
 - A New Zealand branded one-stop shop digital platform, where we can connect learners across their lifetimes with different types of digital education content from all parts of New Zealand. For example, micro-credentials to full digital credentials, virtual summits and tutoring.
 - An offshore pathway initiative that will enable learners to begin their New Zealand journey from their home country and then transfer directly into qualifications offered in New Zealand. This work will start with New Zealand universities and has future potential to involve other providers. (\$10 million over 3 years)
- 
Marketing and Brand Protection
 - Keep New Zealand's brand alive in the hearts and minds of people purchasing international education as well as utilising New Zealand's world leading COVID-19 safety reputation.
 - Targeted promotion campaigns, market channel development and student retention campaigns.
 - Coordinated marketing efforts supporting the recovery and development of the sector and regions. (\$3 million over 2 years)
- 
ENZ activities aligned to recovery plan
 - Education New Zealand will be re-shaping its business plan activity and resources to support and drive the recovery plan.
 - Activity will include brand positioning, optimising engagement with students, partners and offshore providers, student retention and transitions, building the international reputation of New Zealand education, and working with the sector and regions on innovation and new modes of delivery.
- 
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Next steps

- Transition and Economic Stimulus continues to be rolled-out – Mid-August
- Targeted sector engagement – August 2020
- Strengthening the System policy underway – August 2020
- Transforming to a More Sustainable Future State underway – August 2020
- Cross-agency work on developing a suitable model for re-entry of international students – Continues
- Marketing and brand protection activity – commencing August 2020 and ongoing
- Report back to Cabinet on Recovery Plan implementation – December 2020
- Advice to Ministers on Strengthening the System – March-December 2021
- Offshore pathways – soft launch late 2020
- Digital platform in place – prototype ready October-December 2021
- EEL Review – April-December 2021

Further Information

For further information, visit Education New Zealand <https://enz.govt.nz/news-and-research/recovery-plan-for-international-education-sector/>

Boosting quality assurance in all phases

Promote an excellent education and student experience

We continue to tell our story, showcasing New Zealand's distinctive and unique education experience. Our goal is to reinforce New Zealand's focus on the delivery of excellent student experience and the wellbeing of international students.

What we did before the COVID-19 pandemic

This year was one of development as our purpose was focused on continually renewing our brand to respond to arising challenges.

'Think New' brand

In August 2019, ENZ launched a refreshed version of New Zealand's 'Think New' education brand to reflect changed sector and student needs. The refreshed brand was accompanied by the brand position, I Am New, expressing the profound personal transformation that students undergo when in New Zealand.

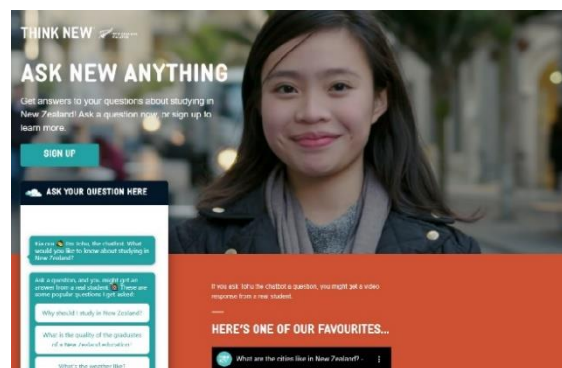
In light of the COVID-19 pandemic, we undertook a review of the brand positioning and messaging. As the refreshed brand speaks directly to disruptions, such as climate change, the impacts of artificial intelligence in the workplace amongst other factors, it was uniquely positioned to be pivoted to address a world in which borders were closed and studies were disrupted.

We are continuing to build a long-term brand strategy to create direction and to leverage off the positive sentiment that New Zealand has received for its response to COVID-19. Central to the ongoing strategy there is a focus on key messages of personal transformation, education quality and practical knowledge. Further emphasis on New Zealand's values of kaitiakitanga, progressiveness and inclusiveness allow us to position the brand for effectiveness across a

range of possible future needs, including student mobility, offshore and online delivery and student retention.

'Ask New Anything' global campaign

To launch the refreshed 'Think New: I am New' brand positioning, ENZ's global digital campaign 'Ask New Anything' went live on 8 October 2019 in ENZ's key markets for eight weeks. The main objective of the campaign was to challenge perceptions of New Zealand by increasing awareness of the country as a high-quality study destination. It showcased New Zealand's innovative new thinking and captured New Zealand's values of societal openness, transparency and manaakitanga.



The sector was encouraged to use the campaign assets available in our BrandLab and were provided with advice on how to leverage the campaign in their own promotional activity.

Database marketing programme

ENZ delivered its three-year database marketing programme, achieving business transformation by focusing our strategic digital capability on our services to the sector. One goal was to create a seamless student journey from attraction through to study, which saw the NauMai NZ website connected to the StudyinNewZealand website.

The Mai ENZ industry portal that combines all of ENZ's digital services in one place and introduces new capability and tools was also developed.

Agents

Education agents are a crucial part promoting New Zealand to potential international students and can play an important role in supporting international students' wellbeing while in New Zealand. Approximately 50% of the students arriving in New Zealand used an agent in some way.

ENZ's AgentLab, a new online tool for agents was launched on 8 July 2019 to connect agents with the tools, training, and information they need to promote New Zealand accurately. As at 30 June 2020, a total of 4,100 agents had signed up to AgentLab.

ENZ also utilised this platform to distribute and deliver COVID-19 related messages and webinars about New Zealand's COVID-19 response to agents.

ENZ Recognised Agency (ENZRA) Programme

ENZ is dedicated to increasing engagement with quality education agencies that have demonstrated a long-term commitment to promoting New Zealand as an international study destination and are successfully placing students with New Zealand education providers.



As part of the ENZRA programme, ENZ regularly communicates with agencies to provide information and guidance regarding topical issues, and ensure they have access to timely and relevant information to promote New Zealand as a study destination. To support this, ENZ delivered a webinar series and in-market ENZRA workshops. We partnered with ENZRA agencies to support digital initiatives including virtual fairs, training sessions for high school counsellors and Masterclass sessions delivered in partnership with Indian universities. These activities have led to engagement with more than 2,000 prospective

students and supported ENZRA agencies in-market.

ENZ completed its first annual review period of the ENZRA programme since its launch in November 2018. A total of 310 agencies globally were selected to be part of the ENZRA programme in 2019/20. Of the ENZRA agencies from 2018/19, 26 lost their ENZRA status and of the 65 applications received from agencies who wanted to enter the programme, 28 were approved for ENZRA status.

International student perceptions of education quality in New Zealand

ENZ's Brand Health research is an annual pulse of the sentiment potential international students have towards New Zealand as an international education destination. Additional research, as part of the brand health research, reinforced that 34% of prospective international students surveyed had a better impression of New Zealand after COVID-19 with especially strong performances for India, Indonesia, China and Thailand. The baseline level of interest in studying overseas is steady at 72% and the key impact of COVID-19 is delay in studying overseas rather than choosing an alternative destination.

Student experience survey

ENZ implemented a new international student satisfaction survey built around conceptual models developed in a previous study and further customised to gather insight into international students' experience while studying in New Zealand.



Survey findings show that 88% of international students rated their overall experience positively, with 86% likely to recommend New Zealand as a study destination. The international students who studied in Dunedin (94%), Christchurch (90%) and Wellington (90%) were most positive about their overall experience.

Our response to the COVID-19 pandemic

New Zealand has a strong international reputation as a desirable study destination that takes good care of international students. How New Zealand treats international students as part of the COVID-19 response is an important part of the international education sector's recovery.

ENZ leads the future direction of the New Zealand international education sector and drives collaboration across agency boundaries to promote international education overseas and support international students in New Zealand.

Student experience and wellbeing

All international students have been impacted by the COVID-19 pandemic with most requiring easily accessible relevant and timely information and resources regarding COVID-19 and protecting their physical and mental health and wellbeing whilst in New Zealand.

ENZ continued to engage with other agencies, peak bodies and international student associations to ensure our communication channels would direct students and providers to official sources of information and resources. In addition, ENZ formed an internal team called Kāhui Oranga focused around student wellbeing and pastoral care of international students to identify issues and areas to bring to the attention of other key agencies including the New Zealand Qualifications Authority and Ministry of Education. The team also shared intelligence gathered from across ENZ with the Ministry of Education to help inform their policy decisions.

ENZ worked closely with key stakeholders, including the New Zealand International Students'

Association, Multicultural Councils NZ and New Zealand International Education Association, to capture issues international students are facing as a result of COVID-19.



The International Student Support Group on Facebook has over 2,900 members with ongoing activity through our social media channels such as Facebook, Instagram, WeChat, Weibo to build a sense of community and ensure they are supported while in New Zealand.

The total followers across all our student facing social media communities is 1,143,896 (including Facebook, Instagram, Twitter, Weibo and WeChat).

Working with other agencies

ENZ's synergistic work with other agencies and contributing to cross-agency initiatives maintained the welfare of affected international students and helped us to continually assess the impact on the international education sector and New Zealand education providers.

ENZ supported the Ministry of Education and the Ministry of Foreign Affairs and Trade to implement and operationalise the repatriation policy framework for repatriating foreign nationals. This included the provision of advice and guidance for international students and education providers in New Zealand we also worked closely with the international education sector and the international, regional and airline sectors to ensure adherence of the requirements under the Education (Pastoral Care of International Students) Code of Practice 2016 around student

wellbeing, including the unique requirements for those under 18 years old.

NauMai NZ

ENZ's NauMai NZ⁹, the official government digital platform tailored for an international student audience supports ENZ to deliver on the International Education Strategy priority, to provide clear, timely information to international students.

Amongst other initiatives, ENZ devoted \$100,000 to enhance NauMai NZ.

NauMai NZ allowed us to increase our communication with international students which became the central place for students to get COVID-19 information via a single trusted source. ENZ used its social networks to encourage international students to join the community. Through ENZ's cross agency work with Immigration New Zealand, all student visa holders in New Zealand were contacted, encouraging them to sign up.



NauMai NZ has included a dedicated COVID-19 page since early February 2020 which aggregated government agency advice in response to the COVID-19 outbreak and included links to university and ITPs webpages about COVID-19. To respond to New Zealand moving to Level 4 (lockdown), the NauMai NZ resource page was updated with the 'Stay well, stay connected' page gathering together advice and resources to

support students throughout their time in self-isolation and beyond.

ENZ's social media channels (Facebook, Twitter, Instagram, Weibo, WeChat) were regularly updated with the latest NauMai NZ content on COVID-19, as has Tohu, the chatbot on ENZ's student facing website.

To address issues arising from a potential language barrier ENZ translated this information into Mandarin and loaded the update to WeChat and ENZ's website in China (www.studyinnewzealand.cn).

The NauMai NZ website has been shortlisted as a finalist in the Student Support category of the PIONEER Awards 2020 global awards that celebrate innovation and achievement across the international education industry.

International Student Hardship Fund

The International Student Hardship Fund (the Fund) was set up and administered by ENZ to assist full-fee paying international students who experienced temporary hardship due to the COVID-19 pandemic.

ENZ received \$630,000 from the International Student Wellbeing Fund for 2019/20 and 2020/21 for distribution to education providers and other organisations and also contributed \$370,000 of our Export Education Levy funding for 2019/20, bringing the total available to \$1 million for the Fund.

The Fund was launched on 21 May 2020, with the criteria published¹⁰ and was closed to further applications on 22 June 2020. Of the 155 applications assessed, 107 were approved, 47 were declined and one application that was approved was subsequently withdrawn.

The Fund provided grants up to a maximum of \$20,000 to education providers who are signatories to the Pastoral Code, community

⁹ NauMai NZ (<https://naumainz.studyinnewzealand.govt.nz/>) embodies the spirit of manaakitanga and provides information on New Zealand's culture and lifestyle, including Tikanga Māori to help international students understand and respect Māori customs and how to interact in Māori culture.

¹⁰ <https://enz.govt.nz/news-and-research/international-student-hardship-grant-fund/>

groups, peak bodies and other organisations who work with international students.

As at 29 September all community organisations and education providers had submitted their final reports regarding the disbursement of their grant.

The total amount spent by education providers, students' associations and community groups to support international students in hardship is \$888,988, with a total underspend of \$111,012 which was returned to the Export Education Levy. The total number of international students supported is 3,963 to provide assistance with accommodation, groceries, winter clothing, local transport, visa application fees and basic living expenses.

ENZ received reports that for many international students, the transnational impacts of a global pandemic were brought into stark contrast. The students spoke of their usual parental support drying up due to the extreme situations that parents and family members found themselves in in their home countries. The Fund provided a critical financial bridge for many, especially as students also spoke of currency fluctuations and issues with the transfer of funds between countries as a result of the pandemic.

For some students, the support was a relief given their stay in New Zealand was extended beyond what had been planned for or anticipated, and having incurred additional unplanned accommodation and utility costs. Some students who were previously believed to be in hardship were able to improve their situations without the need for financial support or returned to their home country.

Tū Ngātahi student domestic brand activity

ENZ allocated \$150,000 to the development of a new brand engagement programme to reach out to international students in New Zealand as a message of support and solidarity to reassure them that they are welcome and safe

here. 'Tū Ngātahi' means stand together and is centred around a uniting symbol of a pounamu "twist", signifying loyalty and friendship between two people or cultures. This initiative



forms part of ENZ's student wellbeing programme and also provides support for student retention activities allowing ENZ, our sector partners and international

student associations to reach out as channel for ENZ to provide emotional support.

Grow sustainable international education

ENZ focused efforts on diversification of source markets and products. Highlights include the development of a new sustainable approach to stabilise and grow international education and build a programme focused on countries where presence and marketing will make both an immediate and long-term difference.

ENZ continued to explore opportunities to grow and diversify where and how New Zealand international education is delivered. Areas considered included the diversified delivery of international education products to match global market opportunities and learner expectations and expanding on where international students can study in New Zealand to facilitate a more even distribution of the benefits of international education.

To strengthen international education by reducing over-reliance on a few source countries for international students, ENZ commissioned a range of research products to gain insights and identify opportunities in various target markets.

To respond to immediate concerns arising from COVID-19 worldwide, ENZ cancelled and

postponed events and other in-market activities such as commercial education fairs, ENZ-organised education fairs, announcement events, scholarship awards ceremonies, workshops and familiarisation trips. To consider a broader range of channels, ENZ looked to develop more appropriate ways to engage with these markets and sectors.

United States of America

ENZ worked towards diversifying the types of students coming from the United States of America (US) into high schools and full degree study to grow value whilst maintaining the positive



Americas

growth trend in the 'Study Abroad' numbers. Our activities are intended to raise the profile of New Zealand and drive preference to it.

As a part of ENZ's diversity and inclusion initiatives in February

2020, ENZ liaised with Whānau Tahī in Washington DC, commissioned by the US Assistant Secretary of State for Indian Affairs. Whānau Tahī works on achieving positive outcomes for Native American and other US indigenous people. Native American Indian Tribes have their own tribal education systems similar to kōhanga reo, kura kaupapa Māori and wānanga and are also positively pre-disposed to working with New Zealand, seeing common connection with Māori.

To deliver on ENZ's diversity strategy, ENZ liaised with the Office of Indian Services, Bureau of Indian Affairs which provides services to almost two million American Indians and Alaska Natives across 573 federally recognised tribes. ENZ also established connections with Native American higher education institutions.

To embrace the US cohorts coming to New Zealand, in November 2019 ENZ signed a renewal of the Education Cooperation Arrangement around the Benjamin A. Gilman

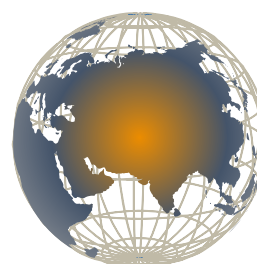
International Scholarship Program with the US Department of State's Bureau of Educational and Cultural Affairs. The program supports economically disadvantaged students from the US to study abroad.

To conduct market research for a full degree US recruitment strategy, ENZ engaged Higher Ed Insights to provide recommendations for ENZ's market strategy by analysing data previously collated by ENZ and conducting further data collection to help determine how to tell the story of New Zealand education in-market.

Recovery of the China market

China market sentiment monitoring

China is New Zealand's largest source of international students and will be important in the recovery of the international education sector. ENZ has been building a digital ecosystem specifically for the China market which was utilised in our response to the COVID-19 pandemic, providing compelling content and



Asia

stories from current students, thought-leaders and influencers.

ENZ led a promotional activity in partnership with the Chinese Central Institute for Vocational and Technical Education in China along with ITPs

and presented at a dedicated New Zealand-China session at the largest international education conference and expo in China, the China Annual Conference for International Education (CACIE).

Due to the early impact of COVID-19 in China, ENZ focused on identifying the initiatives and resources needed to support the recovery of the China market and allocated \$100,000 towards market sentiment monitoring and development of a bespoke public relations strategy in China. Assessment undertaken of the impact of COVID-19 on the New Zealand education brand in China will inform ENZ's future decisions.

ENZ commissioned a research project on vocational education and training in China as both countries have been undergoing significant vocational reform. The research findings are being used to inform future engagement by the Te Pūkenga and its subsidiaries with China.

StudyInNewZealand.cn

Launching a China-hosted version of the StudyInNewZealand website successfully increased ENZ's digital presence in China. The platform has a China domain name (.cn) and is easily viewable by China based audiences, resulting in better access and speed. It also enables ENZ to run marketing campaigns to boost its search rankings in Baidu¹¹. The site is integrated with ENZ's database marketing system, enabling ENZ to follow up leads and capture marketing data and insights. The platform works strategically with ENZ's account on WeChat, China's most popular social media app.



ENZ has had an account on WeChat since 2014 (currently over 53,000 followers) and launched MyStudyNZ on WeChat in 2018. The 'Ask New Anything' campaign was run across WeChat, Weibo, and Zhihu (China's Quora) in October 2019 and the campaign reached 37,000,000+ in exposure¹² and 550,000+ in engagement¹³.

ENZ also ran the 'NauMai Immediate Response' digital campaign to connect with current Chinese

students in New Zealand during the national lockdown. This was done via media buy on WeChat, SkyKiwi (New Zealand's leading Chinese media), and NZCSA (NZ's largest Chinese student organisation). The campaign reached 1,968,000+ in exposure.

Sector engagement

ENZ's approach is focused on finding solutions to establish environmental sustainability and supports the co-designing of innovative approaches with the sector to deliver product development.

As a result of the national and global response to COVID-19, all education providers, both globally and in New Zealand, face immediate and significant challenges. During the latter part of the financial year, ENZ prioritised maintaining regular engagement with multiple sector peak bodies and associated groups to bring about a cohesive and robust approach and reinforce our mutual interest in ensuring stability in the sectors.

The new webpage dedicated to COVID-19 on the ENZ website¹⁴ provided aggregated government agency advice for the education providers, agents and international students in response to the COVID-19 outbreak. The page included links to other agencies webpages containing useful information for international students including health, isolation, travel advisories, education and study, visas and responsibilities under the Education (Pastoral Care of International Students) Code of Practice 2016.

We continued to liaise with other agencies, including the Ministry of Education and New Zealand Qualification Agency, with the goal to provide updates and assistance to education providers, peak bodies and international students. We also encouraged discussions around shared concerns arising from COVID-19, to facilitate the development of future focused initiatives and

¹¹ Baidu is a popular Chinese search engine.

¹² Exposure is the views ENZ recorded from our owned and media buy activities.

¹³ Engagement is the sum of likes, comments, and shares.

¹⁴ <https://enz.govt.nz/news-and-research/ed-news/covid-19-novel-coronavirus-information-for-students-agents-and-peak-bodies/>

continued to foster sector visibility with key decision makers.

ENZ continued to engage with regional organisations, such as Study Dunedin and Christchurch Educated, as well as economic development agencies to maintain awareness of emerging regional issues in response to COVID-19. To support this, ENZ held a webinar to update its regional network regarding the Recovery Plan's development.

New Zealand's regions

ENZ created an opportunity for regions, particularly the regional economic development agencies (EDAs), to apply for co-funding to support international education/student related projects in the areas of talent pathways and/or the transition from secondary school to tertiary study. These replaced the Regional Partnership Programme, except for the Waikato and Northland regions which had not previously received the same level of support as other regions.

The Regional Talent Pathways projects aimed to improve the flow of international tertiary students into regional businesses in areas of skills shortage, and in particular within areas needed to support economic development. This builds on an existing employability focus by supporting EDAs to identify skills gaps, to connect international graduates to employment opportunities and to activate employers to hire international students or graduates.

The Secondary to Tertiary Pathways projects look to improve the transition of international secondary students into tertiary study in New Zealand which in turns improves the retention rate of international secondary school students in New Zealand. We achieve this by supporting EDAs to work with education providers and international students to facilitate stronger pathways between the secondary and tertiary sectors.

The projects supporting the achievement of sustainable international education growth in the Central regions, Queenstown, Christchurch, Auckland, Tauranga and Wellington were

completed, except for four (mostly due the impacts of COVID-19).

Under the Regional Partnership Programme, in the Waikato, ENZ established a solid platform of stakeholder support from multiple sectors to support international education including strategic and self-sustaining multi-industry projects.

In Northland, ENZ achieved a strengthened 'Study Northland' sector body by building the Northland brand in response to COVID-19 to stabilise and



Welcome to the Study Northland Student Ambassador Program.

protect its reputation through student stories. Highlights include targeted support for the development of the International Education Student Programme and the establishment of the Northland Global Citizens Programme.

Future Focus Programme

The Future Focus Programme is a tangible way in which ENZ is supporting the sector to mitigate the impacts of COVID-19 and shape their future in the 'new normal' post COVID-19 world. In March 2020, ENZ reprioritised \$1.2 million of existing funding to establish the Future Focus Programme with a clear focus on innovation – Goal 2 of the *New Zealand International Education Strategy 2018-2030*.

The Programme is directed to sector peak bodies and underpins the transformation of the international education sector by enabling them to realign their business models and modes of

delivery, and tailor it to the needs and interests of each sub-sector. The Programme provided \$200,000 per sub-sector in funding to help peak bodies seed innovation projects at areas of



South America

development and market validation of new and innovative education programmes, services and products including online delivery, joint ventures or new channels to customers.

All sub-sectors provided the first draft of their innovation plans to ENZ by 30 June. The projects are expected to be implemented over the coming financial year.

Develop global citizens

International education brings people together from all parts of the globe to share ideas, skills and knowledge, and in doing so creates friendships.

Global citizens are those who have the skills and ability to study, work and live across cultural and national boundaries. These skills and knowledge can be taught by New Zealand education providers and gained through New Zealand students being able to spend time overseas as well as international students participating in New Zealand education and society. A welcoming environment encourages international students to participate in New Zealand education and society and helps them gain the skills to become a global citizen.

Relationships such as those fostered through research partnerships and links also help New Zealanders to understand our key trading partners and develop opportunities for growth in many other sectors.

Prime Minister's Scholarships for Asia and Latin America

The Prime Minister's Scholarships for Asia (PMSA) and Latin America (PMSLA) are programmes funded by the New Zealand

government and administered by ENZ. During the first part of the financial year ENZ actively monitored the welfare of the scholarship recipients in Hong Kong, Chile and Colombia while civil unrest was occurring in those locations. ENZ provided advice and supported recipients who either wanted to return to New Zealand early or were due to travel into areas where protests were underway.

In early February 2020 after consulting with key agencies and associates, ENZ deferred and then later cancelled the second 2019/20 round of the PMSA and PMSLA and issued communications to key scholarship stakeholders. ENZ continued to monitor the impact of COVID-19 globally and in response to the growing impacts of COVID-19 in countries where recipients were studying or interning, ENZ assisted recipients to return to New Zealand

ENZ contacted PMSA and PMSLA recipients who were due to travel to Asia or Latin America in 2020, to inform them that the New Zealanders were being asked not to travel overseas and advise that their scholarship could be deferred until 2021. ENZ continues to work with key scholarship stakeholders, including education providers, to assess the impact of COVID-19 on scholarships and the PMSA and PMSLA recipients.

Research links with Brazil and Colombia

ENZ invested into increasing New Zealand-Brazilian universities postgraduate study engagement and partnerships. Examples of initiatives that embody our objectives are highlighted below.

ENZ supported a delegation of senior academics and researchers from all eight New Zealand universities to visit Colombia and Brazil in October 2019. The delegates explored options to collaborate in new areas, such as pharmaceutical sciences, and built on previous historical collaboration in areas such as agri-business.

In both Colombia and Brazil, the delegation participated in 'Innovation and Education in New Zealand' seminars for undergraduate and postgraduate students interested in studying in New Zealand. These seminars were co-hosted by members of University New Zealand's Latin America Elite Agent programme.

ENZ formed a partnership¹⁵ with São Paulo Research Foundation¹⁶ (known in Brazil as FAPESP) to grow academic research and exchange between New Zealand and Brazil. ENZ and FAPESP provided \$100,000 to a minimum of eight established academic researchers across any field to pilot the initiative in the first year of the funding agreement.

Successful applicants from New Zealand will complete their projects in São Paulo and FAPESP will send Brazilian researchers to New Zealand (when able to). This reciprocal academic mobility supports stronger international

connections, research links and partnerships. FAPESP and ENZ approved nine projects, providing support to six New Zealand universities to further their international cooperation with five major partners in Brazil.

ENZ, in partnership with the Brazilian Educational and Language Travel Association¹⁷ (BELTA), supported a market research to evaluate how COVID-19 has affected the international education sector in Brazil. The survey was run by the Mobility Research Group and surveyed education agencies and prospective international students. Results will be finalised in 2020/21.

Impact measures

Overall, our impact measures show mixed results for 2019/20. This is largely due to the unprecedented impacts of COVID-19 influencing the delivery and outcome of our strategic initiatives and activities.

Measure	Baseline	Target	Result
International student perceptions of education quality.	2018: 8.0 out of 10 <i>Trend</i> 2019: 7.8 out of 10	2020: 8.2 out of 10	2020: 7.8 out of 10
Commentary: The 2020 target was not achieved and is unchanged from the 2018 result.			
The percentage of international students who were satisfied or very satisfied with their overall experience. ¹⁸	New survey in 2019.	2019: Establish new baseline	2019: 88% ¹⁹
Commentary: A new baseline was established with results that are not comparable to the previous international student satisfaction surveys.			

¹⁵ This partnership follows an agreement between FAPESP and Universities New Zealand in November 2016 to build cooperation, enable academic mobility and encourage the exchange of knowledge between participating higher education institutions.

¹⁶ FAPESP is a public foundation with a mission to support research projects in higher education and research institutions, in all fields of knowledge.

¹⁷ BELTA is the main education agent association in Brazil, representing more than 600 agencies in the country.

¹⁸ This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2019/20. The target in the Vote Tertiary Education Estimates 2019/20 was 88-95%, based on the previous international student satisfaction surveys.

¹⁹ Nielsen: International Student Experience Survey 2019.

Measure	Baseline	Target	Result
The economic value ²⁰ from New Zealand's international education sector.	2008: \$2.51b ²¹ <i>Trend</i> 2012: \$2.60b ²² 2014: \$2.85b ²³ 2016: \$4.29b ²⁴ 2017: \$5.09b ²⁵ 2018: \$4.94b ²⁶	2019: \$5.1b	2019: \$5.23b ²⁷
Commentary: The 2019 target was achieved. The estimated economic value increased by 6% from in 2018, driven by an increase in university and school enrolments. Policies and regulatory settings changes, in addition to ENZ's promotional activities focusing on quality education and student experience, are likely to have caused this change.			
The economic value per international student. ²⁸	2012: \$25,370 <i>Trend</i> 2014: \$25,540 2016: \$32,100 2017: \$39,290 2018: \$39,000	2019: Increase	2019: \$44,951
Commentary: The 2019 target was achieved, driven by an increase in university and school enrolments.			
The percentage of international students enrolled to study outside Auckland. ²⁹	2018: 44%	2019: Increase	2019: 45%
Commentary: The 2019 target was achieved. This was due to a 7% decrease in the number of international students in Auckland and increases in the number of international students in Canterbury, Otago, Waikato, Wellington, Taranaki and Hawke's Bay.			
The percentage of the international education sector's economic value coming from New Zealand's top two markets ³⁰ .	2018: 51.6% ³¹ of the onshore economic value to New Zealand	2019: Decrease	2019: 50.4% of the onshore economic value to New Zealand
Commentary: The 2019 target was achieved, driven by a decrease in the onshore economic value of Chinese students in New Zealand.			
Awareness of the contribution of international education to New Zealand. ³²	2018/19: 58% ³³	2019/20: Increase	2019/20: Not measured
Commentary: Due to the COVID-19 pandemic, ENZ did not undertake this survey.			

20 ENZ commissions a full economic value analysis of the international education sector biennially. In alternate years, ENZ reports an estimated industry value based on the most recent valuation and the latest full year student enrolment figures. This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2019/20.

21 Infometrics, NRB and Skinnerstrategic: The Economic Impact of Export Education, 2008.

22 Infometrics: The Economic Impact of the International Education Industry 2012/13.

23 Infometrics: The Economic Impact of International Education 2014.

24 Infometrics: The Economic Impact of International Education in New Zealand 2015/16 and Infometrics/Covec: Development and Implementation of a new Valuation Methodology for New Zealand's Education Services Exports.

25 m.e. consulting: Economic Valuation of International Education in New Zealand 2018 and PwC: The value of New Zealand's education exports 2018.

26 Estimated value of the international education sector by Education New Zealand. The estimated value is calculated based on the most recent valuation and the number of international students in New Zealand in 2018.

27 Education New Zealand (ENZ) uses methodology based on the Economic Valuation of International Education in New Zealand 2018 report and the Value of New Zealand's Education Exports 2018 report. ENZ uses international students' tuition fees for 2019 and the Consumers Price Index changes in the price of goods and services from December 2017 to December 2019 for New Zealand households. The dollar value is rounding to the nearest billions.

28 Calculated by dividing the total economic value of international students studying in New Zealand by the number of international students studying in New Zealand.

29 This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2019/20.

30 The top two markets were China and India.

31 This result was identified as 40% in ENZ's Statement of Intent 2019-2023 which was the proportion of the number of international students coming from the top two markets, rather than the economic value.

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

33 Kantar: Understanding New Zealanders' perceptions of international Education, 2019. The survey results are reported on a scale of 1-4 (does not contribute), 5-6, 7-8 and 9-10 (contributes strongly). The reported result is based on the percentage of respondents who provides survey ratings of 7-10 on this scale.

ORGANISATIONAL DEVELOPMENT

Our organisational development and capability building activities during 2019/20 were aligned to help us achieve our outcomes and support the implementation of the *International Education Strategy 2018-2030*. We focused on supporting our staff while continuing to implement improvements to lift our organisational capability.

ENZ is committed to having a safe and healthy environment where our staff are empowered. We are constantly improving the way we work and how we deliver our functions to respond to the demands placed on our staff and the sector. To do this, we ensure that all our employment practices are underpinned by good employer principles.

Implementing Rautaki Māori

Building on strong foundations we launched Manapou ki te Ao, ENZ's ingoa Māori (Māori name) during the Te Wiki o te Reo Māori (Māori Language Week) in September 2019. Manapou ki te Ao is a metaphor to describe New Zealand education, nourishing and empowering students like the manapou sustained the kākā and enabling students to flourish.

He Rautaki Māori, our Māori Strategy's three Ngā Whaingā (key objectives) were adopted by ENZ staff. We encouraged the use of te reo me ōna tikanga by developing resources and activities to support staff to improve their te reo Māori skills and by weaving te reo me ōna tikanga Māori into ENZ's purpose, culture and corporate brand.

ENZ's ingoa Māori, Manapou ki te Ao, and the story behind it is central to ENZ's new corporate brand which was aligned with the refreshed Think New brand which was rolled out in December 2019. This was followed by the visual refresh of ENZ's corporate website in early 2020. ENZ's

WHANAKETANGA TAHA WHAKAHAERE



refreshed brand includes Manapou ki te Ao in the New Zealand Fern logo.

ENZ carried out extensive engagement with key organisations such as the Te Taura Whiri i te Reo Māori (the Māori Language Commission), Mana Whenua, Tāhuhu o te Mātauranga (Ministry of Education), Te Wānanga o Awanuiārangī, Mana Tohu Mātauranga o Aotearoa (New Zealand Qualifications Authority), and a Māori language consultant.

In January 2020, ENZ signed a collective agreement (Mahi Tahī) with Te Taura Whiri i te Reo Māori. This was followed by the registration of a te reo Māori language plan with Te Taura Whiri i te Reo Māori.

ENZ's operational response to COVID-19

To respond to the effects of COVID-19 and ensure business continuity, ENZ reviewed its business processes and the types of capability it requires from its people. The measures ENZ undertook to prepare for and respond to the COVID-19 outbreak were aimed at improving business resilience and enhancing people capability to meet the challenges and providing timely and accessible information.

We established a COVID-19 response coordination team to ensure ENZ provided a comprehensive and up-to-date response to

COVID-19 ensuring that any emerging issues were raised with the Leadership Team in a timely manner. This team also participated in cross-agency meetings with peak bodies to ensure an international education perspective was reflected in the meetings and to provide updates on ENZ's response to the pandemic.

In early February 2020, we ran a day in which all staff in all locations worldwide were asked to work away from the office to test emergency response systems and the ability to keep the organisation running in the event of office shut-downs. ENZ relied on cloud-based systems and Zoom capability and achieved ENZ's planned business continuity.

We worked systematically to address issues in specialised areas and to facilitate cross-agency collaboration. Examples of this include the establishment of an internal team, called Kāhui Oranga to monitor student wellbeing issues during the lockdown period through our networks nationally and internationally.

One of ENZ's top priorities was to ensure that staff were and felt supported, remained engaged and fully informed. One of the ways we achieved this was launching the twice a week "CoVideo" sessions available to all staff globally to connect and to highlight work happening across ENZ. This was further supported by our COVID-19 response communications which included regular updates from the Chief Executive to staff, the international education sector and agents.

Staff contributions into COVID-19 CoVideo sessions included inspirational quotes in regards how they coped during the lockdown period at home. Some of the highlights include:

- "Zoom coffees with my ENZ colleagues helped them through this time"
- "The importance of communication, team +work and leadership. These words are often thrown about but rarely exemplified. I'm not only amazed by how brilliant my team mates are but also, how everyone demonstrates their value in the work we do with the utmost

professionalism and sophistication. They inspire me to "level up" constantly and I am honoured to call them my friends in addition to being colleagues. This is a bonus and in my experience a rarity. I will treasure this experience"

We offered multiple morale and wellbeing-related online resources available to staff connected with COVID-19 including EAP resources, Healthy Foods Guide and our own in-house waiata sessions.

ENZ undertook a COVID-19 related "Pulse Survey" in April 2020 to assess staff wellbeing and preparedness globally with a very high response rate (over 90%) indicating that staff felt strongly supported by ENZ.

Gender Pay Action Plan

The current pay difference between males and females in equivalent roles at ENZ averages 1%. Given the total number of staff (92), ENZ considers the difference statistically insignificant and not indicative of a gender pay gap.

Staff engagement survey

ENZ conducts annual staff engagement surveys to gauge the strength of ENZ's workplace culture, inform the organisational development work plan and identify further initiatives towards making ENZ a positive place to work. The 2019 staff engagement survey achieved a 92% response rate including an extremely high 92% endorsement of ENZ's commitment to the staff safety and wellbeing. This included a 90%+ buy-in to ENZ's purpose and direction and very strong clarity about how each employee's role contributes to ENZ's goals and about what success looks like.

Campaign return on investment

ENZ analysed campaign performance data from our digital marketing ecosystem to improve our return on investment. We used live dashboards and data to monitor digital campaign and website performance in real time, with key metrics available to staff via a live campaign dashboard.

Analysis of performance data for campaigns run was also used to determine media buying costs for future campaigns, including optimum target audience size, reach and frequency for each priority market. It also enabled us to test and evaluate creative and content approaches to increase target audience engagement.

Business improvement and the New Zealand Business Number

ENZ continues to record the New Zealand Business Number (NZBN) identifiers for suppliers

in our finance system and we are using these to match financial transactions.

As part of our business improvements and investment in digital capabilities and resources across ENZ, we implemented a new finance system called Microsoft Business Central to allow new system workflow approvals. This uses document capture technology to recognise fields including NZBN.

Monitoring organisational capability

Measure	Baseline	Target 2019-2023	Result 2019/20
Employee engagement.	New baseline in 2018/19.	Increase	ENZ achieved a staff engagement level of 66% favourable, 24% neutral, 10% unfavourable.

OUR PEOPLE

Good employer matters

Our diverse workforce is one of ENZ's key strengths and we have achieved this by weaving an equal employment opportunities strand through all our work to ensure we nurture and harness the talents of all of our people.

Our status as a good employer is assessed against the seven 'good employer' elements set out by the Human Rights Commission. We ensure that all elements are in place and working well through our People Strategy. We continue to evolve our People Strategy to ensure it is appropriate for ENZ's needs and business model. The key elements of the current People Strategy are:

- planning and resourcing
- employee engagement and performance improvement
- developing our people
- recognising and rewarding our people.

Leadership, accountability and culture

Our Ways of Working, "Think Bold, Think Open and Think Team" are one of ENZ's cornerstones – they are integrated into our performance framework, wellbeing initiatives, culture and daily interactions. This year we started to integrate them with our ngā mātāpono (principles) of Manaakitanga, Kaitiakitanga, Whakawhanaungatanga and Aroha so that each supports the other. This work will be implemented in 2020/21.

In 2019/20 a key area of focus of staff engagement initiatives was to build staff resilience, providing strategies for staff working remotely and in isolation, given our globally distributed workforce. These efforts proved their worth when COVID-19 struck in early 2020, as all our staff began to work from home, in sometimes stressful situations, particularly offshore. We

Ā MĀTOU TĀNGATA

increased our efforts to build the frequency and strengths of our internal communications links during this time, using multiple channels to ensure our staff were as fully supported and productive as possible.

The seventh annual staff engagement survey gave us another area of focus, being to increase opportunities for staff development. We heightened our efforts to build visibility internally of short-and long-term vacancies and were successful in offering all staff development options.

The Team Management Index continued to be used to identify the working preferences of staff and to enhance our ability to work together.

Recruitment, selection and induction

The People and Culture team use their well-established relationships with external organisations and online media to assist with staff recruitment and selection. Equal employment opportunity principles are applied throughout the selection process and have resulted in the rich ethnic diversity of staff as shown in our staff profile. A robust induction programme also forms an integral part of training new staff worldwide.

Employee development, promotion and exit

Professional learning and development form part of staff annual performance agreements and are regularly reviewed and updated throughout the year, both by direct managers and at Leadership Team level.

Exit interviews are offered to departing staff. The intention of the interviews is to continually improve the workplace environment and experience for staff. In 2019/20, the interviews did not indicate any trends causing concern about ENZ's culture.

Flexibility and work design

ENZ accepts its responsibility to act as a good employer and has built flexibility into employees' work practices. All staff have been able to change their hours or location of work to accommodate wellbeing issues, the needs of their families, temporarily or longer term, and family-friendly practices are reflected in a clause in our standard employment agreement.

Flexible working arrangements have been offered to male and female staff in equal proportion where they have needed to alter their work hours or location.

Remuneration, recognition and conditions

All staff are employed on individual employment agreements. The standard terms and conditions are regularly reviewed to ensure they are legally compliant. While ENZ does not have collective employment arrangements, one staff member belongs to the Public Service Association.

Permanent employees and fixed term staff on long-term agreements participate in regular performance reviews. Self-assessments, performance planning and the identification of development and learning opportunities are integral to this process. Remuneration is reviewed annually, taking into account market conditions, performance and affordability. For 2019/20, our approach to remuneration reviews has been heavily influenced by the worldwide economic issues created by the COVID-19 pandemic and we will not be offering pay increases as we have in previous years but are emphasising the development opportunities accessible to employees.

Harassment and bullying prevention

ENZ is committed to providing a work environment that is free from any form of workplace harassment including bullying. The workplace harassment policy provides behaviour expectations, clear guidelines and processes to

assist managers and staff in the resolution of any workplace harassment complaints raised.

Safe and healthy environment

ENZ regards a safe and healthy working environment as integral to our positive workplace culture. Staff again rated the organisation very highly in the staff engagement survey for initiatives in this area. All staff worldwide have 24/7 access to EAP services. We also provide on-call medical and safety expertise to staff travelling internationally for work anywhere in the world. Our focus on flexible work hours and locations has assisted with managing stress issues, especially during the COVID-19 crisis.

Sick leave and annual leave usage is monitored monthly. Managers, assisted by the People and Culture team, work closely to support staff who need to put leave plans in place.

The ENZ Board takes a very active interest in staff wellbeing and are briefed about this at every Board meeting.

Equal employment opportunities workplace

ENZ actively seeks to be a good employer through our values, our recruitment, retention and development policies and our engagement with staff. We actively support staff in their professional development, and will continue to focus on talent management, succession planning and retention.

Review programmes and policies

Our HR policies are reviewed regularly to ensure compliance with legislation and to maintain their relevance.

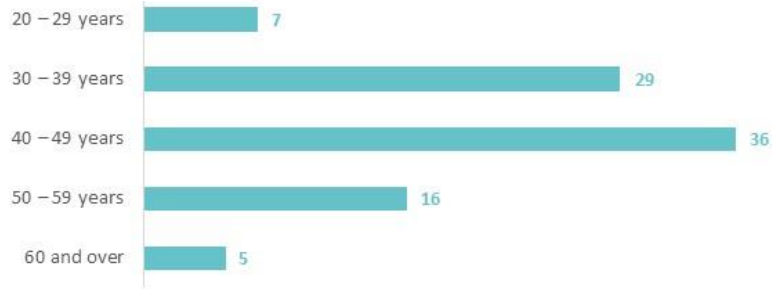
Throughout the year, staff are reminded about certain policies to ensure their visibility. We retain an ongoing focus on the Leave Policy, including ensuring staff are aware of the changes to Parental Leave, the availability of Domestic Violence Leave etc.

Our workforce profile at 30 June 2020

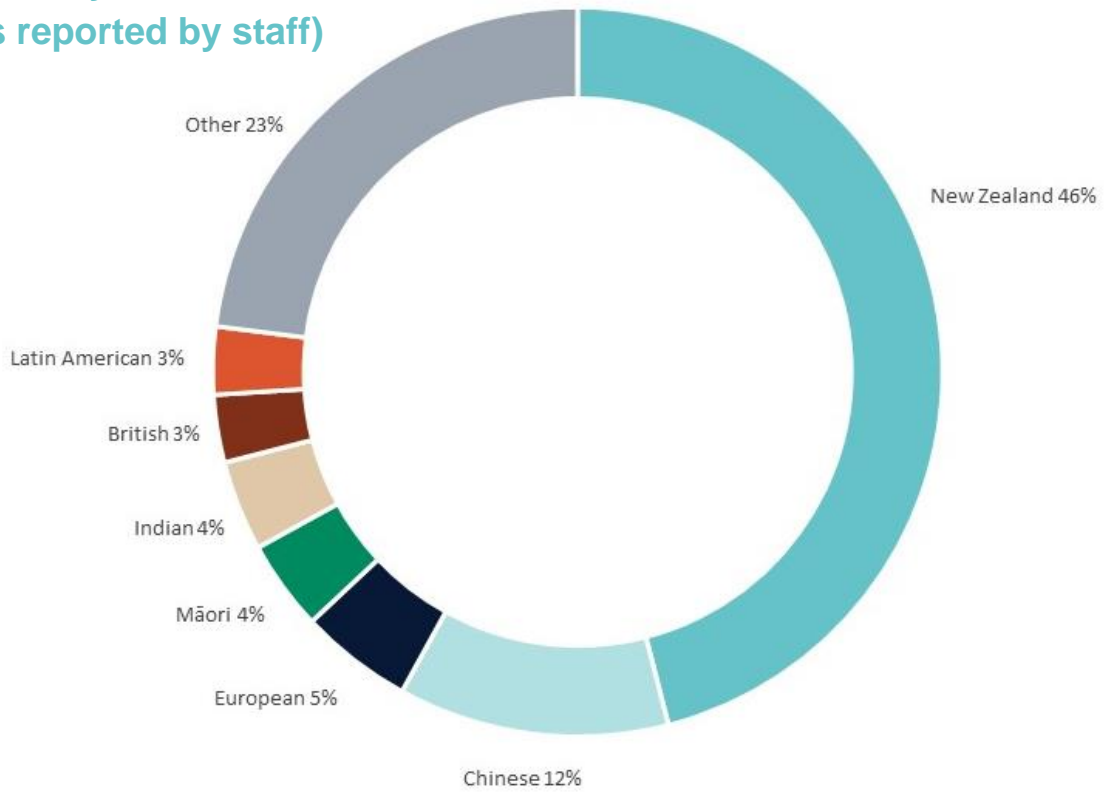
90.7

Full time equivalent staff

Age Profile



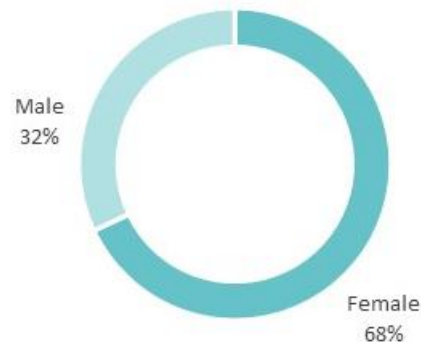
Ethnicity Profile (as reported by staff)



Disability profile

No current ENZ staff members have reported a disability. Staff are invited to disclose any disabilities once they have been accepted for employment, so we can make any necessary adjustments to the work environment. Our offices are accessible to people with disabilities.

Gender Profile



STATEMENT OF RESPONSIBILITY

TAUAKI KAWENGA

We are responsible for the preparation of Education New Zealand's financial statements and statement of performance, and for the judgements made in them.

We are responsible for any end-of-year performance information provided by Education New Zealand under section 19A of the Public Finance Act 1989.

We have the responsibility for establishing and maintaining a system of internal control designed to provide reasonable assurance as to the integrity and reliability of financial reporting.

In our opinion, these financial statements and statement of performance fairly reflect the financial position and operations of Education New Zealand for the year ended 30 June 2020.

Signed on behalf of the Board:



Steve Maharey | Board Chair
17 December 2020



Lyn Provost | Deputy Chair
17 December 2020

STATEMENT OF PERFORMANCE

TAUAKI WHAKATUTUKINGA

This Statement of Performance reports against the performance measures in ENZ's Statement of Performance Expectations 2019-2020. It covers the period from 1 July 2019.



Total appropriations

\$000	2019/20 Actual	2019/20 SPE ³⁴
Revenue – Crown	33,494	35,146
Revenue – Other	2,596	2,475
Total Revenue	36,090	37,621
Expenditure	35,726	37,621
Surplus	364	-

International education programmes

\$000	2019/20 Actual	2019/20 SPE
Revenue – Crown	31,444	30,796
Revenue – Other	2,596	2,475
Total Revenue	34,040	33,271
Expenditure	34,101	33,271
Surplus/Deficit	(61)	-

Awards for outbound New Zealand students

\$000	2019/20 Actual	2019/20 SPE
Revenue – Crown	1,450	3,750
Total Revenue	1,450	3,750
Expenditure	1,226	3,750
Surplus/Deficit	224	-

Scholarships for inbound international students

\$000	2019/20 Actual	2019/20 SPE
Revenue – Crown	600	600
Total Revenue	600	600
Expenditure	399	600
Surplus/Deficit	201	-

Appropriation funding

\$000	2019/20 Actual	2019/20 Final Budget
Vote Tertiary Education		
<i>Non-departmental output expense</i>		
International education programmes	31,444	34,014
<i>Benefits and other related expenses</i>		
Awards for outbound New Zealand students	1,450	3,984
Scholarships for inbound international students	600	600
Total baseline	33,494	38,598

See Note 21 'Explanation of major variances against budget' - for an explanation of the difference between 2019/20 Actual 'Revenue – Crown' versus 2019/20 SPE 'Revenue – Crown' for 'International education programmes' and 'Awards for outbound New Zealand students' appropriations.

³⁴ ENZ's Statement of Performance Expectations 2019-2020

STATEMENT OF PERFORMANCE

TAUAKI WHAKATUTUKINGA

An explanation of the impact of COVID-19 on ENZ's performance measures is included on page 65.

International education programmes

This appropriation is limited to delivery of services in respect of international education, including promotion, information, research and professional development, both in New Zealand and overseas, for the purpose of delivering an excellent student experience, achieving sustainable growth and developing global citizens.

What is intended to be achieved with this appropriation?

This appropriation is intended to achieve enhanced social, cultural and economic benefits to New Zealand through New Zealand international education activities.

Performance measure	Actual 2018/19	Target 2019/20	Actual 2019/20	Status 2019/20
Percentage of facilitated customers ³⁵ that agree ³⁶ ENZ's services and support have added value to their organisation. ³⁷	93% ³⁸	≥ 75%	Not measured ³⁹	■
Percentage of Active Visits ⁴⁰ on ENZ's studyinnewzealand.govt.nz website.	77%	≥ 75%	77%	✓
Number of registrations to ENZ's Student Membership Programme through studyinnewzealand.govt.nz website.	108,837	80-100,000	93,052 ⁴¹	✓
Number of registrations to NauMai NZ. ⁴²	New measure in 2019/20.	Establish baseline	6,263	✓
Number of key messages about the benefits to New Zealand from international education delivered by third parties ⁴³ .	156	≥ 180	52 ⁴⁴	✘
Percentage of users satisfied ⁴⁵ with the information and intelligence provided by ENZ. ⁴⁶	78% of users rated the information on IntelliLab as "good" or higher	≥ 87%	Not measured ⁴⁷	■

35 'Facilitated customers' are large education providers, peak bodies and regional partners that ENZ business development managers work actively with to provide growth-focused services and targeted support.

36 Measured by a survey of users. Survey ratings = Strongly agree, Agree, Neither agree nor disagree, Strongly disagree, Don't know.

37 The survey results are influenced by how the survey administrator sets up the survey parameters such as number of responses per user, when and to whom the survey link is sent, and the collation of the outcome. Limitations of the survey have been identified as a) participants can complete a survey more than once and b) results may not reflect all the completed surveys. This survey was sent to 712 customers and 159 customers responding, resulting in a response rate of 22%. This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2019/20.

38 This measure has been revised from the Annual Report 2018/19 which reported 79% of customers agreed that ENZ's services and support added value to their organisation.

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

40 Active visits' are defined as those where the visitor engages with the website content e.g. clicking links, scrolling and viewing multiple pages or video. It is considered a measure of both the quality of the traffic to the website and the quality of the content on the website. A rate of 20% is considered an indicator of quality website by industry standards.

41 Due to the COVID-19 pandemic, ENZ ran only one of two planned global digital campaigns during 2019/20.

42 NauMai NZ is ENZ's student experience portal at <https://naumainz.studyinnewzealand.govt.nz/>.

43 Third parties include media, opinion leaders and broadcast production.

44 The target is not met as ENZ's communications work was refocused due to the COVID-19 pandemic and the scope of ENZ's communications strategy was broadened to include New Zealand Institute of Skills and Technology transition and implementation, and international student wellbeing.

45 Survey ratings = Excellent, Very good, Good, Neither good nor poor, Poor, Very poor, Dreadful.

46 This survey was sent to 1,064 users, with 50 responding. The response rate was 5%.

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

Awards for outbound New Zealand students

This appropriation is limited to awards granted to provide assistance to scholars, researchers and teachers to undertake placements abroad and to participate in reciprocal education exchange arrangements with partner countries in selected areas of priority study, teaching and research.

ENZ receives funding through this appropriation to fund the Prime Minister's Scholarship for Asia and the Prime Minister's Scholarship for Latin America. The administration costs for running the scholarship programmes sit within the International Education Programmes appropriation.

What is intended to be achieved with this appropriation?

This appropriation is intended to achieve access to wider international educational opportunities for skilled New Zealanders to enhance their existing skills.

Performance measure	Actual 2018/19	Target 2019/20	Actual 2019/20	Status 2019/20
Percentage of Prime Minister's Scholarship recipients who report making five or more professional/business connections during their time on scholarship. ⁴⁸	56%	≥ 60%	55% ⁴⁹	x
Percentage of Prime Minister's Scholarship recipients who report making five or more academic connections during their time on scholarship. ⁴⁸	52%	≥ 60%	53% ⁵⁰	x

Scholarships for inbound international students

This appropriation is limited to scholarships available to international students wishing to study in New Zealand.

ENZ receives funding through this appropriation to fund the New Zealand International Doctoral Research Scholarships. The administration costs for running this scholarship programme sits within the International Education Programmes appropriation. Since 2018/19 no new scholarships have been awarded. The funding for this appropriation is decreasing as recipients complete their multi-year scholarships.

What is intended to be achieved with this appropriation?

This appropriation is intended to achieve an increase in New Zealand's economic value from international students studying in New Zealand.

Activity indicator	Actual 2018/19	Activity standard 2019/20	Actual 2019/20
Number of new and existing New Zealand International Doctoral Research Scholarships funded.	27	10-20	20

⁴⁸ The completion of this report within one month of completing their scholarship is compulsory for all recipients.

⁴⁹ Less than 60% of either the Prime Minister's Scholarship for Latin America (PMSLA) recipients and the Prime Minister's Scholarship for Asia (PMSA) recipients reported making five or more professional/business connections. No recipients travelled overseas after the October to December 2020 quarter.

⁵⁰ Less than 60% of PMSLA recipients and PMSA recipients reported making five or more academic connections. No recipients travelled overseas after the October to December 2020 quarter.

ANNUAL FINANCIAL STATEMENTS

TAUAKI PŪTEA Ā-TAU



Statement of comprehensive revenue and expense for the year ended 30 June 2020

\$000	Note	2020 Actual	2020 Budget	2019 Actual
Revenue				
Revenue from the Crown - Operating	1	31,444	30,796	30,564
Revenue from the Crown - Scholarships	1	2,050	4,350	4,550
Other revenue	2	2,451	2,300	1,461
Interest revenue		145	175	207
Total revenue		36,090	37,621	36,782
Expenditure				
Personnel costs	3	13,301	13,215	12,010
Other expenses	4	20,494	19,697	19,899
Scholarship expenses	5	1,625	4,350	4,536
Depreciation and amortisation expenses	9, 10	306	359	283
Total expenditure		35,726	37,621	36,728
Surplus / (Deficit)		364	-	54
Other comprehensive revenue / (expense)		-	-	-
Total comprehensive revenue / (expense)		364	-	54

The accompanying notes form an integrated part of these financial statements.

Statement of financial position as at 30 June 2020

\$000	Note	2020 Actual	2020 Budget	2019 Actual
Assets				
Current assets				
Cash and cash equivalents	6	2,128	424	418
Receivables	7	180	250	109
Investments	8	5,000	5,000	4,800
Prepayments		430	100	748
Total current assets		7,738	5,774	6,075
Non-current assets				
Property, plant, and equipment	9	148	208	204
Intangible assets	10	411	412	574
Total non-current assets		559	620	778
Total assets		8,297	6,394	6,853
Liabilities				
Current liabilities				
Payables	11	4,297	3,000	3,346
Employee entitlements	12	890	500	730
Provisions	13	54	500	158
Total current liabilities		5,241	4,000	4,234
Non-current liabilities				
Employee entitlements	12	191	-	118
Provisions	13	53	-	53
Total non-current liabilities		244	-	171
Total liabilities		5,485	4,000	4,405
Net assets		2,812	2,394	2,448

The accompanying notes form an integrated part of these financial statements.

Statement of changes in equity for the year ended 30 June 2020

\$000	Note	2020 Actual	2020 Budget	2019 Actual
Balance		2,448	2,394	2,394
Comprehensive revenue and expense				
Total comprehensive revenue / (expense)		364	-	54
Balance at 30 June		2,812	2,394	2,448

The accompanying notes form an integrated part of these financial statements.

Statement of cash flows for the year ended 30 June 2020

\$000	Note	2020 Actual	2020 Budget	2019 Actual
Cash flows from operating activities				
Receipts from the Crown - Operating		31,444	30,796	30,564
Receipts from the Crown – Scholarships		2,050	4,350	4,550
Receipts from other revenue		2,335	2,300	1,538
Payments to suppliers		(22,768)	(24,047)	(27,825)
Payments to employees		(11,223)	(13,215)	(10,597)
Goods and services tax (GST)		29	-	439
Net cash flow from operating activities	14	1,867	184	(1,331)
Cash flows from investing activities				
Payments for new term deposits		(2,500)	-	(800)
Interest received		130	175	176
Purchase of property, plant, and equipment		(87)	(140)	13
Receipt from sale of property, plant & equipment		-	-	(13)
Purchase of intangible assets		-	(550)	(493)
Receipt from maturity of term deposits		2,300	-	-
Net cash flows from investing activities		(157)	(515)	(1,117)
Net cash flows from financing activities				
Net increase/(decrease) in cash and cash equivalents		1,710	(331)	(2,448)
Cash and cash equivalents at the beginning of the year		418	755	2,866
Cash and cash equivalents at the end of the year		2,128	424	418

The accompanying notes form an integrated part of these financial statements.

NOTES TO THE FINANCIAL STATEMENTS

1. Statement of accounting policies

Reporting entity

Education New Zealand (ENZ) is a Crown entity as defined by the Crown Entities Act 2004 and was established on 1 September 2011 under the Education Act 1989 (the Education Amendment Act 2011). As such ENZ's ultimate parent is the New Zealand Crown. ENZ is funded primarily by government through Vote Tertiary Education.

ENZ's primary objective is to provide services to the New Zealand public as opposed to that of making a financial return. Accordingly, ENZ has designated itself as a public benefit entity (PBE) for the purposes of New Zealand Equivalents to International Public-Sector Accounting Standards (IPSAS). ENZ is domiciled in New Zealand. ENZ's statutory functions are set out in appendix one.

These financial statements are for the year ended 30 June 2020 and were approved by the Board on 17 December 2020.

Basis of preparation

ENZ's financial statements have been prepared on a going concern basis.

Statement of compliance

The financial statements have been prepared in accordance with the requirements of the Crown Entities Act 2004 and Education Act 1989 (the Education Amendment Act 2011), which includes the requirement to comply with generally accepted accounting practice in New Zealand (NZ GAAP).

The financial statements have been prepared and presented in accordance with Tier 1 PBE accounting standards. ENZ qualifies under the Tier 1 reporting framework as it is a public benefit

entity with total annual expenditure in excess of \$30 million.

The financial statements comply with PBE accounting standards.

Measurement base

The financial statements have been prepared on an historical cost basis.

Presentation currency and rounding

The financial statements are presented in New Zealand dollars and all values are rounded to the nearest thousand dollars (\$000), unless otherwise stated.

Standards issued and not yet effective and not early adopted

An amendment to PBE IPSAS 2 Statement of Cash Flows requires entities to provide disclosures that enable users of financial statements to evaluate changes in liabilities arising from financing activities, including both changes arising from cash flows and non-cash changes. This amendment is effective for annual periods beginning on or after 1 January 2021, with early application permitted. ENZ does not intend to early adopt the amendment.

The External Reporting Board XRB issued PBE IPSAS 41 Financial Instruments in March 2019. This standard supersedes PBE IFRS 9 Financial Instruments, which was issued as an interim standard. It is effective for reporting periods beginning on or after 1 January 2022. ENZ will adopt PBE IFRS 41 Financial Instruments on or after 1 July 2021. Although ENZ has not assessed the effect of the new standard, it does not expect

any significant changes as the requirements are similar to PBE IFRS 9.

PBE FRS 48 replaces the service performance reporting requirements of PBE IPSAS 1 and is effective for reporting periods beginning on or after 1 January 2022. ENZ will assess how application of PBE FRS 48 will affect its statement of performance during the year ending 30 June 2021.

There are no other standards or amendments issued that are expected to have a material impact on ENZ.

Significant accounting policies

The following accounting policies, which significantly affect the measurement of financial performance and of financial position, have been consistently applied.

Revenue

Revenue is measured at fair value and is recognised as income when earned and is reported in the financial period to which it relates.

Revenue from the Crown

ENZ is primarily funded through revenue received from the Crown, which is restricted in its use for the purpose of ENZ meeting the objectives specified in our Statement of Intent and Statement of Performance Expectations.

Recovery for conference, events, and fairs

We recovered some of the cost of the 2019 New Zealand International Education Conference and other events that promote education in New Zealand (education fairs and agent seminars) from participants.

Interest revenue

Interest revenue is recognised using the effective interest method.

Co-funding expenditure

Co-funding arrangements are approved and administered by ENZ for a variety of industry development purposes and periods. Subsequent payment of the co-funding amounts is dependent on the recipient meeting terms and conditions laid out in the co-funding contract between ENZ and the recipient.

At balance date each individual co-funding arrangement is assessed to determine the extent to which the conditions attached to the funding have been satisfied and therefore the amount of funds that will be granted. Co-funding arrangements with unfulfilled conditions are recognised as a future commitment – see note 13 Provisions.

Foreign currency transactions

Foreign currency transactions are translated into New Zealand dollars using the spot exchange rate at the date of the transaction.

Operating leases

Leases that do not transfer substantially all the risks and rewards incidental to ownership of an asset to ENZ are classified as operating leases. Lease payments under an operating lease are recognised as an expense on a straight-line basis over the term of the lease in the statement of comprehensive revenue and expense.

Scholarships

ENZ approves and administers the granting of scholarships, both for New Zealand students to study abroad and for international students to study in New Zealand.

Scholarship costs are recognised as expenditure on awarding of the scholarship.

Cash and cash equivalents

Cash and cash equivalents include cash held on-call with the bank.

Receivables

Short-term receivables are recorded at the amount due, less an allowance for credit losses. ENZ applies the simplified expected credit loss model of recognising lifetime expected credit losses for receivables.

In measuring expected credit losses, short-term receivables have been assessed on a collective basis as they possess shared credit risk characteristics. They have been grouped based on the days past due.

Short-term receivables are written off when there is no reasonable expectation of recovery. Indicators are that there is no reasonable expectation of recovery include the debtor being in liquidation.

Investments

Bank term deposits

Bank term deposits are initially measured at the amount invested. Interest is subsequently accrued and added to the investment balance. A loss allowance for expected credit losses is recognised if the estimated loss allowance is not trivial.

Property, plant, and equipment

Property, plant, and equipment asset classes consist of leasehold improvements and make-good, computer hardware, furniture and office equipment and a motor vehicle.

Property, plant, and equipment are shown at cost, less accumulated depreciation, and impairment losses.

Additions

The initial and any subsequent cost of an item of property, plant, and equipment is recognised as an asset only when it is probable that future economic benefits or service potential associated with the item will flow to ENZ and the cost of the item can be measured reliably.

Work in progress (assets under construction) is recognised at cost.

In most instances, an item of property, plant, and equipment is initially recognised at its cost. Where an asset is acquired through a non-exchange transaction it is recognised at its fair value as at the date of acquisition.

The costs of day-to-day servicing of property, plant and equipment are recognised in the statement of comprehensive revenue and expense as incurred.

Disposals

Gains and losses on disposals are determined by comparing the sale proceeds with the carrying amount of the asset. Gains and losses on disposals are included in the statement of comprehensive revenue and expense.

Depreciation

Depreciation is provided on a straight-line basis at rates that will write down the cost (or valuation) of the assets over their useful economic lives. The useful economic lives and associated depreciation rates of major asset classes have been estimated as follows:

Leasehold improvements & make-good	The lesser of either 10 years, with an annual depreciation rate of 10%, or over the remaining term of the lease of the building that has been fitted out
Computer hardware	3 years or 33.3% per annum
Furniture & office equipment	5 years or 20.0% per annum
Motor vehicles	4 years or 25.0% per annum

Intangible assets

Software development

Costs that are directly associated with the development of software are recognised as an intangible asset. These costs include software development, employee costs and any directly attributable overheads.

Costs associated with maintaining software and the development and maintenance of ENZ digital properties are recognised as an expense when incurred.

Amortisation

Amortisation begins when the intangible asset is available for use and ceases at the date that the asset is de-recognised. The amortisation charge for each period is recognised in the statement of comprehensive revenue and expense. The useful economic life and associated amortisation rate of the major class of intangible asset owned by ENZ has been estimated as follows:

Internally developed software	4 years or 25.0% per annum
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Impairment of property, plant and equipment and intangible assets

Property, plant, and equipment and intangible assets that have a finite useful life are reviewed for impairment whenever events or changes in circumstances indicate that the carrying amount may not be recoverable. If such an indication exists, and where the carrying values exceed the estimated recoverable amount, an asset is written down to its recoverable amount. Losses resulting from impairment are reported in the statement of comprehensive revenue and expense.

Payables

Payables are recorded at their face value.

Employee entitlements

Short term employee entitlements

Employee entitlements that ENZ expects to be settled within 12 months of balance date are measured at undiscounted nominal values based on accrued entitlements at current rates of pay. This includes salaries and wages accrued up to balance date and annual leave earned, but not yet taken, at balance date.

ENZ recognises a liability and an expense for a bonus where there is a likelihood it will be paid.

Long term employee entitlements

Employee entitlements which are due to be settled beyond 12 months which include provisions for post-employment benefits payable to some employees upon cessation of employment are reported at current value.

Superannuation schemes

Defined contribution schemes

Our obligations for contributions to KiwiSaver are accounted for as a defined contribution superannuation scheme and recognised in the statement of comprehensive revenue and expense.

Provisions

A provision is recognised for future expenditure of uncertain amount or timing when there is a present obligation (either legal or constructive) as a result of a past event, and it is probable that an outflow of future economic benefits will be required to settle the obligation, and a reliable estimate can be made of the amount of the obligation.

Co-funding arrangements

See Statement of Accounting Policies: Co-funding expenditure, for further information.

Lease make-good

Where there is an indication or expectation from the lessor that a building is to be returned to its original condition at the end of the lease period, a provision for the estimated cost to make good the premise is made – see note 13 Provisions. Lease make-good provisions are recorded at cost and are recognised on a straight-line basis over the period of the lease.

Equity

Equity is comprised of accumulated funds and is measured as the difference between total assets and total liabilities.

Goods and services tax (GST)

All items in the financial statements, including appropriation statements, are stated exclusive of GST, except for receivables and payables, which are stated on a GST-inclusive basis. Where GST is not recoverable as input tax, then it is recognised as part of the related asset or expense.

The net amount of GST recoverable from, or payable to, Inland Revenue is included as part of receivables or payables in the statement of financial position.

The net GST paid to, or received from, Inland Revenue (including the GST relating to investing activities), is classified as an operating cash flow in the statement of cash flows.

Commitments and contingencies are disclosed exclusive of GST.

Income tax

We are a public authority and consequently are exempt from income tax. Accordingly, no provision has been made for income tax.

Budget

The budget was approved by the Board and presented in ENZ's Statement of Performance Expectations 2019-2020. The budget figures have been prepared in accordance with NZ GAAP, using accounting policies that are consistent with those adopted by the Board in preparing these financial statements. See note 21 Explanation of major variances against budget, for further information where Actual differs to Budget.

Critical accounting judgments, estimates and assumptions

In preparing these financial statements we have made estimates and assumptions concerning the future. These estimates and assumptions may differ from subsequent actual results. Estimates and assumptions are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed reasonable under the circumstances.

ENZ has exercised judgment when recognising expenditure on co-funding agreements, to determine if conditions of the arrangement have been fulfilled. Unfulfilled conditions are treated as future commitments – see note 13 Provisions.

A provision has been made for future restoration costs relating to make-good clauses on office rental leases. The calculation of this provision requires assumptions as to the extent, if any, that landlords will enforce the lease make-good clauses and estimates of the cost of restoration. These uncertainties may result in future actual expenditure differing from amounts currently provided. Provisions are periodically reviewed and updated, based on information available at the time. The carrying amounts are disclosed in note 13 Provisions.

2. Other revenue

\$000	2020 Actual	2019 Actual
Other revenue under exchange transactions		
Recoveries for conference, events, and fairs	743	1,108
Gain on sale of property, plant and equipment	-	-
Other revenue	1,150	68
Total other revenue under exchange transactions	1,893	1,176
Other revenue under non-exchange transactions		
Other revenue	558	285
Total other revenue under non-exchange transactions	558	285
Total other revenue	2,451	1,461

3. Personnel costs

\$000	2020 Actual	2019 Actual
Salaries and wages	10,974	10,370
Other personnel related costs	901	643
Contractors	935	615
Restructuring costs	-	44
Employer contributions to KiwiSaver	255	235
Increase in annual leave	163	17
Increase in post-employment benefits	73	86
Total personnel costs	13,301	12,010

4. Other expenses

\$000	2020 Actual	2019 Actual
Audit fees to Audit New Zealand for audit of financial statements	72	80
Board member remuneration	127	123
Advertising, events, and fairs	5,948	7,064
Research, policy, and other advice	6,204	4,900
Staff travel	886	1,268
Operating lease expenses	409	380
Loss on disposal of property, plant, and equipment	-	13
Co-funding arrangements	881	1,459
English language training programmes	865	-
Other operating expenses	5,102	4,612
Total other expenses	20,494	19,899

Operating lease

ENZ has lease agreements in place for Wellington until 31 July 2023, Auckland until 31 October 2022, and Christchurch has no set end date but terminable upon three months' notice.

The future aggregate minimum lease and sub-lease payments to be made under non-cancellable operating leases were as follows:

\$000	2020 Actual	2019 Actual
Not later than one year	349	369
Later than one year and not later than five years	850	55
Later than five years	-	-
Total non-cancellable operating leases	1,199	424

5. Scholarship expenses

\$000	2020 Actual	2019 Actual
New Zealand International Doctoral Research Scholarships	399	797
Prime Minister's Scholarships for Asia	844	2,697
Prime Minister's Scholarships for Latin America	382	1,042
Total scholarship expenses	1,625	4,536

New Zealand International Doctoral Research Scholarships enable international students to come to New Zealand to undertake or continue PhD study. These scholarships are funded through the Scholarships for inbound international students appropriation.

Prime Minister's Scholarships for Asia and Latin America are granted to scholars, researchers, and teachers to undertake placements abroad and to participate in reciprocal education exchange arrangements with partner countries in selected areas of priority study, teaching and research. These scholarships are funded through the Awards for outbound New Zealand students appropriation.

Two application rounds for the Prime Minister's Scholarships for Asia and Latin America are held each year. The second round scheduled for May 2020 was cancelled, and unspent funding of \$2.300 million was returned to the crown.

6. Cash and cash equivalents

The on-call account earned interest at rates set by the bank. ENZ had cash and cash equivalents at 30 June 2020 of \$2.128 million (30 June 2019: \$0.418 million).

7. Receivables

\$000	2020 Actual	2019 Actual
Receivables under exchange transactions		
Interest receivable from bank	15	31
Receivables from the sale of services	132	16
Total receivables under exchange transactions	147	47
Receivables under non-exchange transactions		
Goods and services tax (GST) receivable	33	62
Total receivables under non-exchange transactions	33	62
Total receivables	180	109

The aging profile of receivables at 30 June 2020 was:

\$000	2020 Actual	2019 Actual
Not past due	51	110
Past due by 1 – 30 days	-	-
Past due by 31 – 60 days	129	(1)
Total	180	109

All receivables greater than 30 days in age were considered to be past due. We await the refund details for an overpaid event registration.

There were no movements in the provision for impairment of receivables in 2019/20 (2018/19: nil).

8. Investments

Our investments comprised of term deposits with maturity dates no greater than 180 days. Investments are measured at face value plus accrued interest, with no allowance for expected losses. ENZ had investments of \$5.0 million at 30 June 2020 (30 June 2019: \$4.8 million).

9. Property, plant, and equipment

Movements for each class of property, plant and equipment were as follows:

\$000	Furniture & office equipment	Computer hardware	Motor vehicles	Leasehold improvements & make-good	Total
Cost					
Balance at 1 July 2018	107	694	69	332	1,202
Additions/transfers at cost	-	-	-	-	-
Disposals	-	(137)	-	-	(137)
Balance at 30 June 2019	107	557	69	332	1,065
Balance at 1 July 2019	107	557	69	332	1,065
Additions/transfers at cost	-	87	-	-	87
Disposals	(5)	(12)	-	-	(17)
Balance at 30 June 2020	102	632	69	332	1,135
Accumulated depreciation					
Balance at 1 July 2018	76	424	69	224	793
Depreciation expense	18	117	-	57	192
Elimination on disposal	-	(124)	-	-	(124)
Balance at 30 June 2019	94	417	69	281	861
Balance at 1 July 2019	94	417	69	281	861
Depreciation expense	6	88	-	49	143
Elimination on disposal	(5)	(12)	-	-	(17)
Balance at 30 June 2020	95	493	69	330	987
Carrying amounts					
Balance at 1 July 2018	31	270	-	108	409
Balance at 1 July 2019	13	140	-	51	204
Balance at 30 June 2020	7	139	-	2	148

Capital commitments

As at 30 June 2020, ENZ had nil commitments in respect of property, plant and equipment (30 June 2019: nil).

10. Intangible assets

ENZ's intangible assets are all classified as internally developed software. At 30 June 2020 the assets in this class consisted of ENZ digital properties and the IT operating environment.

There have been no indicators that the useful economic lives of our internally developed software assets will be materially different to that estimated when they became available for use.

Movements for the internally developed software asset class were as follows:

\$000	Internally developed software	Assets under construction	Total
Cost			
Balance at 1 July 2018	817	30	847
Additions/transfers at cost	30	463	493
Disposals	-	-	-
Balance at 30 June 2019	847	493	1,340
Balance at 1 July 2019	847	493	1,340
Additions/transfers at cost	493	-	-
Disposals	-	(493)	-
Balance at 30 June 2020	1,340	0	1,340
Accumulated depreciation			
Balance at 1 July 2018	675	-	675
Depreciation expense	91	-	91
Elimination on disposal	-	-	-
Balance at 30 June 2019	766	-	766
Balance at 1 July 2019	766	-	766
Depreciation expense	163	-	163
Elimination on disposal	-	-	-
Balance at 30 June 2020	929	-	929
Carrying amounts			
Balance at 1 July 2018	142	30	172
Balance at 1 July 2019	81	493	574
Balance at 30 June 2020	411	-	411

Capital commitments

As at 30 June 2020, ENZ had nil commitments in respect of intangible assets (30 June 2019: nil).

11. Payables

\$000	2020 Actual	2019 Actual
Payables under exchange transactions		
Creditors	1,173	1,928
Accrued expenses	2,944	1,085
Income received in advance	-	185
Total payables under exchange transactions	4,117	3,198
Payables under non-exchange transactions		
Fringe benefit tax payable	13	15
Co-funding payable	167	61
Scholarships payable	-	72
Total payables under non-exchange transactions	180	148
Total payables	4,297	3,346

Accrued expenses include the return of \$2.300 million to the crown for unspent funding due to the cancellation of the second round of the Prime Minister's Scholarships for Asia and Latin America due to COVID-19.

12. Employee entitlements

\$000	2020 Actual	2019 Actual
Current Portion		
Accrued salaries and wages	143	146
Annual leave	747	584
Total current portion	890	730
Non-current portion		
Post-employment benefits	191	118
Total non-current portion	191	118
Total employee entitlements	1,081	848

Post-employment benefits are accrued for offshore employees where there is a requirement to make an end of service payment under local labour laws and regulations.

13. Provisions

\$000	2020 Actual	2019 Actual
Current portion		
Co-funding arrangements	54	158
Total current portion	54	158
Non-current portion		
Lease make-good	53	53
Total non-current portion	53	53
Total provisions	107	211

Movements for each class of provision were as follows:

\$000	Co-funding arrangements	Lease make-good	Total
Cost			
Balance at 1 July 2018	161	53	214
Additional provisions made	(1,479)	-	(1,479)
Amounts used	1,476	-	1,476
Balance at 30 June 2019	158	53	211
Balance at 1 July 2019	158	53	211
Additional provisions made	(1,579)	-	(1,579)
Amounts used	1,475	-	1,475
Balance at 30 June 2020	54	53	107

Co-funding commitments

As at 30 June 2020, ENZ had commitments relating to the last year of a multi-year regional partnership programme of \$0.150 million (30 June 2019: \$0.115 million), with all payments to be made within one year.

Lease make-good

ENZ is required to return any leased premise to its original state at the expiry of the lease. See note 1 Statement of Accounting Policies: Critical accounting judgments, estimates and assumptions, for further information.

14. Reconciliation of net deficit to net cash flow from operating activities

\$000	2020 Actual	2019 Actual
Surplus	364	54
Add non-cash items		
Depreciation and amortisation expense	306	283
Total non-cash items	306	283
Add / (Less) items classified as investing or financing activities		
Interest received	(130)	(176)
Loss on disposal of property, plant, and equipment	-	13
Total items classified as investing or financing activities	(130)	(163)
Add / (Less) movements in statement of financial position items		
(Increase) / Decrease in receivables	(133)	72
(Increase) / Decrease in prepayments	318	(299)
Increase / (Decrease) in payables	984	(1,860)
Increase / (Decrease) in provisions	(104)	(3)
Increase / (Decrease) in employee entitlements	233	146
(Increase) / Decrease in Goods and Services tax (GST)	29	439
Net movements in working capital items	1,327	(1,505)
Net cash flow from operating activities	1,867	(1,331)

15. Contingent assets and liabilities

ENZ had no contingent assets as at 30 June 2020 (30 June 2019: none).

ENZ had no contingent liabilities as at 30 June 2020 (30 June 2019: none).

16. Related party transactions

Education New Zealand is a wholly owned entity of the Crown.

Related party disclosures have not been made for transactions with related parties that are within a normal supplier or client/recipient relationship on terms and conditions no more or less favourable than those it is reasonable to expect that we would have adopted in dealing with the party at arm's length in the same circumstances. Further, transactions with other government agencies (e.g. Government departments and Crown funded tertiary institutions) are not disclosed as related party transactions when they are consistent with

the normal operating arrangements between government agencies and undertaken on the normal terms and conditions for such transactions.

Related party transactions required to be disclosed

There were no material related party transactions required to be disclosed.

Key management personnel

ENZ's key management personnel are the Board, Chief Executive, and the Senior Leadership team. The remuneration and full time equivalent of key management personnel was:

\$	2020 Actual	2019 Actual
Board members		
Remuneration	123,958	122,830
Full-time equivalent members	0.79	0.85
Leadership Team		
Remuneration	1,648,539	2,234,385
Full-time equivalent members	6.00	8.38
Total key management personnel remuneration	1,772,497	2,357,215
Total full-time equivalent personal	6.97	9.23

The full-time equivalent for Board members was determined using the number of days of commitment to ENZ per annum, as set out in each member's letter of appointment to the Board. The full-time equivalent for the Senior Leadership team, including the Chief Executive, was determined using the contracted hours, as set out in each member's employment agreement.

17. Remuneration

Board remuneration

\$000	2020 Actual	2019 Actual
S Maharey (Chair)	33	18
L Provost (Deputy Chair)	20	13
V Spackman	17	16
L Sissons	17	16
R Tuwhangai	17	13
D Wilson (from 13 December 2019)	9	-
K Rolleston (to 20 February 2020)	11	16
S Vijayakumar (Future Director)	3	-
C Finny (Chair to 28 February 2019)	-	22
P Broughton	-	3
R Leggat	-	3
J Morris	-	3
Total remuneration	127	123

Our Future Director was appointed by the Board.

No Board members received compensation or other benefits in relation to cessation.

Employee remuneration

During the year 48 employees received remuneration and other benefits that exceeded \$100,000 per annum as follows:

Remuneration range	2020 Actual	2019 Actual
\$100,000 – 109,999	9	7
\$110,000 – 119,999	5	6
\$120,000 – 129,999	7	5
\$130,000 – 139,999	2	5
\$140,000 – 149,999	6	7
\$150,000 – 159,999	5	2
\$160,000 – 169,999	4	1
\$170,000 – 179,999	-	-
\$180,000 – 189,999	-	2
\$190,000 – 199,999	-	1
\$200,000 – 209,999	-	2
\$210,000 – 219,999	2	1
\$230,000 – 239,999	1	-
\$240,000 – 249,999	2	3
\$250,000 – 259,999	1	-
\$270,000 – 279,999	1	-
\$290,000 – 299,999	-	1
\$330,000 – 339,999	1	-
\$370,000 – 379,999	-	1
\$410,000 – 419,999	-	1
\$440,000 – 449,999	1	-
\$460,000 – 469,999	1	-
Total employees	48	45

During the year one staff member received compensation and other benefit payments in relation to cessation totalling \$43,701 (2018/19: two staff members received \$54,766).

We hold Directors and Officers Liability and Professional Indemnity insurance which provides protection to Board members and senior management for wrongful acts or professional mistakes committed whilst carrying out their duties associated with the management of the organisation.

18. Events after balance date

There were no significant events after balance date.

19. Financial instruments

ENZ, as part of its everyday operations, is party to financial instruments that have been recognised in our financial statements. These financial instruments include accounts payable and accounts receivable, cash and term deposits.

All financial instruments are recognised in the statement of financial position, and revenues and expenses in relation to all financial instruments are recognised in the statement of comprehensive revenue and expense.

A. Financial instrument categories

The carrying amounts of financial assets and liabilities were:

\$000	2020 Actual	2019 Actual
Cash, receivables, and investments		
Cash and cash equivalents	2,128	418
Receivables	180	109
Investments	5,000	4,800
Total cash, receivables, and investments	7,308	5,327
Payables		
Payables	4,297	3,346
Total payables	4,297	3,346

B. Financial instrument risks

Our activities expose us to the following financial instrument risks: market risk, credit risk and liquidity risk. We have policies and procedures to manage the risks associated with financial instruments. These policies and procedures do not allow us to enter into any transactions that are speculative in nature. Market risk

Fair value interest rate risk

Fair value interest rate risk is the risk that the fair value of a financial instrument will fluctuate due to changes in market interest rates.

We limit our exposure to fair value interest rate risk by placing funds in bank term deposits with maturity dates no greater than 180 days. ENZ does not actively manage our exposure to fair value interest rate risk.

Currency risk

Currency risk is the risk that the fair value or future cash flows of a financial instrument will fluctuate due to changes in foreign exchange rates.

ENZ maintains an on-call bank account denominated in New Zealand dollars. However, we do purchase goods and services overseas that require us to enter into transactions denominated in foreign currencies. This activity exposes us to currency risk.

Credit risk

Credit risk is the risk that a third party will default on its obligations causing us to incur loss.

In the normal course of business ENZ is exposed to credit risk from cash and term deposits held with banks and receivables. For each of these the maximum credit exposure is best represented by the carrying amount in the statement of financial position. There have been no defaults in the payment of interest or return of principal on our term deposits. ENZ limits its credit risk by only placing funds in an on-call account or term deposits held with banks registered in New Zealand that have a minimum Standard and Poor's credit rating of AA-.

Credit quality of financial assets

The credit quality of financial assets that are neither past due nor impaired can be assessed by reference to Standard and Poor's credit ratings.

The credit quality of ENZ's financial assets as at 30 June 2020 was:

\$000	2020 Actual	2019 Actual
Counterparties with credit ratings AA-		
Cash at bank and term deposits	7,128	5,218
Receivables	15	32
Total counterparties with credit ratings AA-	7,143	5,250
Counterparties without credit ratings		
Receivables with no defaults in the past	165	77
Total counterparties without credit ratings	165	77

Liquidity risk

Management of liquidity risk

Liquidity risk is the risk that ENZ will not have enough cash on hand to meet commitments as they fall due. ENZ manages liquidity risk by continuously monitoring forecast and actual cash flow requirements.

Contractual maturity analysis of financial liabilities

Our financial liabilities were payables. All our payables fell due within three months. The carrying amount of payables was equivalent to the contractual cash flows, as ENZ expected to make all payments by the due date.

20. Capital management

Equity is comprised of accumulated funds and is measured as the difference between total assets and total liabilities.

ENZ is subject to the financial management and accountability provisions of the Crown Entities Act 2004. The act imposes restrictions in relation to borrowings, acquisition of securities, issuing guarantees and indemnities and the use of derivatives. ENZ has complied with the provisions of the act for the year ended 30 June 2020.

ENZ manages its financial dealings prudently, enabling the business to meet its objectives.

21. Explanation of major variances against budget

Explanations for major variances from the budgeted figures presented in the Statement of

Performance Expectations 2019-2020 are as follows:

International Education Programmes Revenue – Crown Actual is higher than Budget by \$0.648m due to:

- A successful application to the Digital Government Partnership Innovation Fund 2019/2020 for \$0.630m of funding to progress a new industry web portal to house all Education New Zealand digital tools and services.
- Funding for the NZ Story of \$0.282m was transferred from ENZ's International education programmes appropriation to New Zealand Trade and Enterprise.
- The Ministry of Education contributed \$0.300m toward the establishment of a hardship fund for international students, which was managed and also funded by ENZ.

Awards for Outbound New Zealand Students Revenue – Crown Actual was lower than Budget by \$2.300m as round two of the 2019/20 Prime Minister's Scholarships was cancelled, and the unused crown revenue returned to the Ministry of Education.

22. Impact of COVID-19 on financial performance

In preparing these financial statements we have made estimates and assumptions concerning the future. ENZ has not identified any material uncertainties in our financial statements due to Covid-19.

The impact of Covid-19 is represented by the following timeline showing the reconfiguration of expenditure.

Due to the early impact of COVID-19 in China, ENZ focused on stopping promotional activity and identifying the initiatives and resources needed to support the recovery of the China market and allocated \$100,000 towards market monitoring and development of a bespoke public relations strategy in China.

In early February 2020, after consulting with key agencies and associates, ENZ deferred and then later cancelled the second 2019/20 round of the Prime Minister's Scholarships for Asia and Latin America. The unused crown revenue of \$2.300 million was returned to the Ministry of Education.

From March 2020 onwards, ENZ devoted \$100,000 to enhance our primary digital communication platform NauMai NZ. This platform allowed ENZ to increase its communication with international students and NauMai NZ became the central place for students to get COVID-19 information via a single trusted source. ENZ allocated \$150,000 to the development of a new brand engagement programme to reach out to international students in New Zealand to reassure them that they are welcome and safe here. In April 2020 ENZ reprioritised \$1.2 million of existing funding to establish the Future Focus Programme with a clear focus on innovation. This is a tangible way in which ENZ is supporting the sector to mitigate the impacts of COVID-19 and shape their future in the 'new normal' post COVID-19.

The International Student Hardship Fund was set up and administered by ENZ in May 2020 to assist full-fee paying international students who experienced temporary hardship due to the COVID-19 pandemic. ENZ contributed \$370,000 of the Export Education Levy funding for 2019/20.

In total ENZ identified and stopped over \$2 million of budgeted activity in the International Education Programmes appropriation and replaced it with the newly identified activities that support the

international education sector, connect with international students in New Zealand and gather intelligence about the international student markets.

Impact of COVID-19 on ENZ's performance measures

Due to the significant impact of the COVID-19 pandemic on New Zealand's international education sector, ENZ's involvement in cross-agency to provided communications and support to the sector and the move to Level 4 (lockdown of New Zealand) on 25 March 2020, ENZ decided not to survey the sector to assess the quality of the support and services provided by ENZ.

The change in ENZ's focus to ensure that international student wellbeing was supported via our communications and social media channels and our work to provide communications to the sector and education agents meant that, from February 2020, ENZ did not work to encourage third parties to deliver our key messages about the benefits of international education to New Zealand. These changes to ENZ's work programme impacted the reported results for ENZ's performance measures for 2019/20.

INDEPENDENT AUDITOR'S REPORT

PŪRONGO KAIAROTAKE MOTUHAKE

To the readers of Education New Zealand's financial statements and performance information for the year ended 30 June 2020

The Auditor-General is the auditor of Education New Zealand (ENZ). The Auditor-General has appointed me, Ajay Sharma, using the staff and resources of Audit New Zealand, to carry out the audit of the financial statements and the performance information, including the performance information for appropriations, of ENZ on his behalf.

Opinion

We have audited:

- the financial statements of ENZ on pages 47 to 65, that comprise the statement of financial position as at 30 June 2020, the statement of comprehensive revenue and expense, statement of changes in equity and statement of cash flows for the year ended on that date and the notes to the financial statements including a summary of significant accounting policies and other explanatory information; and
- the performance information of ENZ on pages 33 to 34 and 43 to 45.

In our opinion:

- the financial statements of ENZ on pages 47 to 65:
 - present fairly, in all material respects:
 - its financial position as at 30 June 2020; and
 - its financial performance and cash flows for the year then ended; and
 - comply with generally accepted accounting practice in New Zealand in accordance with Public Benefit Entity Reporting Standards; and
- the performance information on pages 33 to 34 and 43 to 45:
 - presents fairly, in all material respects, ENZ's performance for the year ended 30 June 2020, including:
 - for each class of reportable outputs:
 - its standards of delivery performance achieved as compared with forecasts included in the statement of performance expectations for the financial year; and
 - its actual revenue and output expenses as compared with the forecasts included in the statement of performance expectations for the financial year; and
 - what has been achieved with the appropriations; and

- the actual expenses or capital expenditure incurred compared with the appropriated or forecast expenses or capital expenditure.
- complies with generally accepted accounting practice in New Zealand.

Our audit was completed on 17 December 2020. This is the date at which our opinion is expressed.

The basis for our opinion is explained below, and we draw attention to the impact of Covid-19 on ENZ. In addition, we outline the responsibilities of the Board and our responsibilities relating to the financial statements and the performance information, we comment on other information, and we explain our independence.

Emphasis of matter – Impact of Covid-19

Without modifying our opinion, we draw attention to the disclosure about the impact of Covid-19 on ENZ as set out in note 22 on pages 64 to 65 of the financial statements and on pages 33, 44 and 65 which pertains to the impact on performance information.

Basis for our opinion

We carried out our audit in accordance with the Auditor-General's Auditing Standards, which incorporate the Professional and Ethical Standards and the International Standards on Auditing (New Zealand) issued by the New Zealand Auditing and Assurance Standards Board. Our responsibilities under those standards are further described in the Responsibilities of the auditor section of our report.

We have fulfilled our responsibilities in accordance with the Auditor-General's Auditing Standards.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of the Board for the financial statements and the performance information

The Board is responsible on behalf of ENZ for preparing financial statements and performance information that are fairly presented and comply with generally accepted accounting practice in New Zealand. The Board is responsible for such internal control as they determine is necessary to enable them to prepare financial statements and performance information that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements and the performance information, the Board is responsible on behalf of ENZ for assessing ENZ's ability to continue as a going concern. The Board is also responsible for disclosing, as applicable, matters related to going concern and using the going concern basis of accounting, unless there is an intention to merge or to terminate the activities of ENZ, or there is no realistic alternative but to do so.

The Board's responsibilities arise from the Crown Entities Act 2004 and the Public Finance Act 1989.

Responsibilities of the auditor for the audit of the financial statements and the performance information

Our objectives are to obtain reasonable assurance about whether the financial statements and the performance information, as a whole, are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion.

Reasonable assurance is a high level of assurance, but is not a guarantee that an audit carried out in accordance with the Auditor-General's Auditing Standards will always detect a material misstatement when it exists. Misstatements are differences or omissions of amounts or disclosures, and can arise from fraud or error. Misstatements are considered material if, individually or in the aggregate, they could reasonably be expected to influence the decisions of readers, taken on the basis of these financial statements and the performance information.

For the budget information reported in the financial statements and the performance information, our procedures were limited to checking that the information agreed to ENZ's Statement of Performance Expectations, Statement of Intent and relevant Estimates and Supplementary Estimates of Appropriations 2019/20.

We did not evaluate the security and controls over the electronic publication of the financial statements and the performance information.

As part of an audit in accordance with the Auditor-General's Auditing Standards, we exercise professional judgement and maintain professional scepticism throughout the audit. Also:

- We identify and assess the risks of material misstatement of the financial statements and the performance information, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- We obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of ENZ's internal control.
- We evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the Board.
- We evaluate the appropriateness of the reported performance information within ENZ's framework for reporting its performance.
- We conclude on the appropriateness of the use of the going concern basis of accounting by the Board and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on ENZ's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements and the performance information or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause ENZ to cease to continue as a going concern.
- We evaluate the overall presentation, structure and content of the financial statements and the performance information, including the disclosures, and whether the financial statements and the performance information represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with the Board regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

Our responsibilities arise from the Public Audit Act 2001.

Other information

The Board is responsible for the other information. The other information comprises the information included on pages 2 to 72 but does not include the financial statements and the performance information, and our auditor's report thereon.

Our opinion on the financial statements and the performance information does not cover the other information and we do not express any form of audit opinion or assurance conclusion thereon.

In connection with our audit of the financial statements and the performance information, our responsibility is to read the other information. In doing so, we consider whether the other information is materially inconsistent with the financial statements and the performance information or our knowledge obtained in the audit, or otherwise appears to be materially misstated. If, based on our work, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

Independence

We are independent of ENZ in accordance with the independence requirements of the Auditor-General's Auditing Standards, which incorporate the independence requirements of Professional and Ethical Standard 1: International Code of Ethics for Assurance Practitioners issued by the New Zealand Auditing and Assurance Standards Board.

Other than in our capacity as auditor, we have no relationship with, or interests, in ENZ.



Ajay Sharma
Audit New Zealand
On behalf of the Auditor-General
Wellington, New Zealand

APPENDIX ONE: OUR STATUTORY FUNCTIONS

ĀPITIHANGA TUATAHI: Ā MĀTOU MAHI Ā-TURE

ENZ's functions are specified in section 270 of the Education Act 1989. Our statutory functions are to:

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

APPENDIX TWO: GLOSSARY AND ABBREVIATIONS

ĀPITIHANGA TUARUA: KUPUTAKA ME NGĀ WHAKAPOTONGA

EDAs	Regional economic development agencies
ENZ's priority markets	ENZ's priority markets were Brazil, Chile, China, Colombia, the European Union, India, Indonesia, Japan, Republic of Korea, Malaysia, the Philippines, Saudi Arabia, Thailand, the United States of America and Viet Nam
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
Recovery Plan	The Strategic Recovery Plan for International Education
Pastoral Code	Education (Pastoral Care of International Students) Code of Practice 2016

APPENDIX THREE: OUR BOARD

ENZ's Board is made up of between five and seven members appointed by the Minister of Education. The Board is responsible for the governance, including setting its strategic directions and its monitoring performance. The Board regularly meets to carry out governance functions and address major challenges that may affect international education. On the Board's behalf, the Audit and Risk Committee monitors the financial and risk management of ENZ.

Board Members at 30 June 2020

Steve Maharey (Chair)



Steven Maharey is an independent director and consultant on a wide range of social and political issues. He was previously the Vice-Chancellor of Massey University and was a Member of Parliament and Senior

Minister in the New Zealand Government (1999-2008). Earlier in his career he was a Senior Lecture 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, and 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.

ĀPITIHANGA TUATORU: TŌ MĀTOU POARI

Lyn is also the Chair of the ENZ Board's Audit and Risk Committee.

Dr Linda Sissons



Dr 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 is a director and leader across many sectors including education, media, arts, creativity and technology. She is a previous CEO of Gibson Group and remains a director of that company. In 2016 she 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 Maori 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 the New Zealand Qualifications Authority and is a current Member of Council for Manukau Institute of Technology. She is a former lecturer of the University of Auckland in teacher education.

Daniel Wilson



After positions at several schools in Auckland and London, Daniel Wilson 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 is also the Lead Principal and Governance Chairperson for the Top of the South Trades Academy. Daniel continues to work with various national and regional advisory groups.

Shruthi Vijayakumar



Shruthi has joined the ENZ Board for 12 months as part of the New Zealand Institute of Directors' Future Directors Programme. Shruthi currently runs her own coaching and

facilitation business, is a co-founder of Emerge Institute and teaches at Auckland University of Technology.



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NUEVA ZELANDA
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Education New Zealand

Level 5, 160 Lambton Quay
Lambton House
Wellington 6144

Phone: +64 4 472 0788

Industry website: www.enz.govt.nz

NZBN: 9429041901793

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