

# Education New Zealand

Quarterly Report for 1 January to 31 March 2021

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## Contents

<b>ENZ's Leadership role</b> .....	<b>3</b>
<b>Introduction</b> .....	<b>4</b>
<b>ENZ's Operational update</b> .....	<b>4</b>
Recovery Plan Governance and Engagement Workstream.....	4
Key Activities .....	5
Early Return of Students Workstream .....	6
Key Activities .....	6
Social licence of international education in New Zealand Workstream:.....	7
Key Activities .....	8
International reputation Workstream:.....	8
Key Activities .....	9
Innovation Workstream:.....	13
Key Activities .....	13
Risks and Issues Management.....	14
<b>Our organisational development</b> .....	<b>15</b>
Building ENZ's capability Workstream .....	15
Key Activities .....	15
<b>Financial performance to 31 December 2020</b> .....	<b>16</b>
ENZ's financial review .....	17
<b>ENZ's Impact, Performance and Organisational measures</b> .....	<b>18</b>
Impact measures .....	18
Performance measures.....	19
Activity indicator.....	20
Organisational capability.....	20

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## ENZ's Leadership role

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International education is a highly competitive sector globally and has been heavily affected by the global impacts of the COVID-19 pandemic. To support the international education sector to recover and adapt to the new environment, ENZ has embraced a wider strategic leadership role in the rebuild of the sector and to shape the future of New Zealand's international education sector. We are focused on delivering on our international education leadership role, facilitating a targeted and sophisticated approach in the wider system on rebuilding a diverse, resilient and sustainable sector.

Our leadership role extends to much more than solely interpreting the New Zealand International Education Strategy through an education lens. ENZ is committed to move forward in the right direction to promote and achieve the change needed to transform the international education system. One of our aspirations is to set expectations and accelerate the pace to collaboratively identify and deliver immediate priorities amongst agencies to agree to areas of common understanding while recognising those areas of differences. These priorities include ENZ playing a lead role in the back to market plan with input from All of Government and sector.

ENZ will play an important role in ensuring international education plays its part in supporting New Zealand's economic recovery from the impact of COVID-19. We are partnering with other agencies to deliver services with greater sense of cooperation, recognising that adjusting immigration and education settings, continuing regulatory work related to pastoral care of international students is critical to ensure we collectively achieve the New Zealand International Education Strategy's outcomes.

Due to the impacts of COVID-19, some of our functions, focus and objectives have changed fundamentally and may evolve further over the second half of 2020/21. As a response to the changes in our national and global operating environment, ENZ has commenced strategic planning to be undertaken for the next four years to focus on strategic and operational initiatives to drive ENZ's prioritisation and direction of travel, directing effort to where the most impact will be achieved. ENZ's re-prioritisation is reinforced by the financial review, undertaken as a separate and parallel exercise, to ensure that we maximise return on our investments by making the greatest impact in the system.

Our focus extends to maintaining international market relationships and strengthening education engagement to ensure, once the borders reopen, there is continued interest in New Zealand education. We make sure that our current initiatives towards diversity, equity and inclusion contribute to maintaining our offshore presence and our engagement with our key stakeholders; government officials, academic partners and agents supports our education relationships and strengthen existing relationships. These education relationships will drive global influence and enhance diplomatic objectives and collaboration.

Our work with New Zealand's education agencies supports the development and recommitting arrangements with other national and local partners in Japan, the People's Republic of China, the Republic of Korea, and soon Thailand and Viet Nam. In the medium term, these agreements enable New Zealand education providers to form new partnerships, exchange programmes and virtual initiatives, to boost their students' cultural competency and global citizenship skills. In the long term, these agreements are an important part of New Zealand's knowledge diplomacy work ensuring global connectedness to New Zealand.

As we continue to account for worldwide developments our overarching goal is to create and facilitate an enabling environment for the sector to change and evolve whilst providing sector leadership.

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## Introduction

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

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

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

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

ENZ continues to progress work on implementing its component of the Recovery Plan including convening the Chief Executives' and General Managers' Group to oversee the implementation of the Recovery Plan, along with delivering ENZ's strategic priorities.

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

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## ENZ's Operational update

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Project governance continues to be managed within each applicable workstream to ensure the delivery of outputs, outcomes and key milestones. ENZ's Portfolio Director oversees project management across all the Business Plan and Recovery Plan initiatives, and supports the Senior Leadership Team managing these areas.

Over the quarter ENZ made good progress on our key initiatives. Overall momentum is in the right direction, but as our work programmes contain a high proportion of external dependencies we continue to actively manage and monitor delivery.

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

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## Recovery Plan Governance and Engagement Workstream

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

## Key Activities

### Highlights over the quarter

The General Managers' Group continues to meet monthly to monitor implementation progress, align work programmes and identify and discuss issues. A focus for the General Managers' Group has been on understanding the impact on the sector of the COVID-19 pandemic, the support the sector would like from Government and the strategies the sector has for supporting its rebuild. You have indicated your interest in hearing from the sector and will meet with sector representatives in May 2021.

ENZ's workstream, focusing on diversifying products and services is key to rebuilding a more resilient and sustainable future for international education with the General Managers providing input as the work is developing.

The Chief Executives meeting for the remainder of 2021 are in May, July and October. This Group supports the governance and implementation of the Recovery Plan, seeking to generate agreement across agencies about what New Zealand values and expects from the future of international education, and has alignment across government to achieve those goals.

### Supporting the sector

#### *Deep dive workshops with sub-sectors on the Recovery Plan*

During February 2021 ENZ and the MoE held deep dive workshops with representatives from across the international education sector with the aim to better understand how each has been impacted by the COVID-19 pandemic and to inform advice to the Minister of Education regarding the Recovery Plan. The workshops were held with representatives of each of the sub-sectors ENZ works with; schools, universities, institutes of technology, English language providers, private training establishments and education products and services including engagement with regional economic development agencies.

Representatives from each sub-sector (including their peak body) were invited to discuss specific impacts the pandemic has had beyond the headline economic impact and student numbers such as the impact on domestic learners, course provision, and how the recruitment pipeline has been disrupted. The workshops looked beyond the headline economic and student numbers to gain up-to-date intelligence from each sub-sector to identify potential responses to support the sector's recovery, develop impact statements and evidential bases.

Due to the changes to COVID-19 Alert Levels on 14 February, scheduled workshops had to be postponed and rescheduled with the institutes of technology and polytechnics sub-sector. To support the delivery of desired outcomes during the virtual workshops ENZ administered a survey to participants to brainstorm the impacts of the COVID-19 pandemic, issued to the institutes of technology and polytechnics sub-sector on 16 February. These workshops were completed on 2 March 2021.

ENZ worked with the MoE to reflect the feedback from the sub-sector workshops and agencies informed advice to you on the refresh of the Recovery Plan. It was also shared with the International Education Chief Executives' Group to inform agency planning.

A number of sector-wide themes have emerged across the sector

Sector representatives noted their appreciation for government support for the international education sector, including with regard to the support for state and state integrated schools, the PTE Targeted Assistance Fund, and the ESOL Provision Fund. The workshops focused on exploring the impacts of COVID-19 and what is needed for recovery, so the majority of sector commentary related to what further actions could be undertaken.

- Concerns regarding the border and managed isolation
- Frustration with government decisions and lack of agency alignment
- Loss of capacity and capability across the sector
- Declining international reputation of New Zealand
- Impact on the domestic sector
- Online learning.

#### *Education Agencies meeting*

ENZ worked with the MoE to provide advice to you as indicated at the Education Agencies meeting on 22 February to inform the refresh the Recovery Plan. The following key themes were identified:

- a need for greater clarity as to when, and in what circumstances, the sector is able to bring students back,
- a need for formal government-sector engagement mechanism to facilitate greater engagement with government around announcements and input into policy development,



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- a desire to better understand Government's intention for the future of international education in New Zealand.

#### *Peak Bodies forum 17 March 2021*

ENZ hosted a forum with representatives from the international education peak bodies to explore options for supporting the sector peak bodies to be able to continue their core functions, given the impacts of COVID-19, and to ensure that the network remains in place to support sector recovery and rebuild. Current and ongoing engagement with the sector including senior government officials was a key theme. The sector noted the importance of early and meaningful engagement with them in the policy development process and developing an effective mechanism for this to occur.

The forum collated an overview of feedback from the sub-sector. The forum included an update from Immigration New Zealand (INZ), covering recently announced changes of INZ's offshore footprint and sector input into the Pathway Student visa. There was an update on online and blended delivery from the New Zealand Qualifications Authority (NZQA), and an update from MoE and the Ministry of Business, Innovation and Employment's (MBIE) Managed Isolation and Quarantine (MIQ) on the logistics for the two cohorts of students granted exceptions to the New Zealand border closure.

The key points from the forum were shared with the Recovery Pan General Managers' Group at a meeting on 18 March 2021.

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## **Early Return of Students Workstream**

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

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

## **Key Activities**

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### **Highlights over the quarter**

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#### **Retention of existing students in New Zealand**

##### *Entry of international student cohort to New Zealand*

In February 2021, education providers began to identify and nominate students who can return under the 1,000-cohort of degree-level or higher students exception class, announced in January 2021. It was anticipated that the first of these students would return in April 2021.

As at 26 April 2021, education providers have nominated 820 international students to return to New Zealand under the 1,000 degree level or higher exceptions cohort. There are a number of options to fill all places, including tweaking the allocation model. Of these, 549 have submitted an Invitation to Apply (ITA), and 326 have submitted visa applications (193 approved, 1 withdrawn, 131 under assessment). As at 26 April 2021, 8 students from this cohort have arrived in New Zealand.

As at 26 April 2021, 247 international students have been nominated to return to New Zealand under the 250 post-graduate and PhD student exception cohort, of whom 239 students have been invited to apply for an appropriate visa. Of these 239, 227 have submitted a visa application (219 approved, 1 withdrawn, 7 under assessment). As at 26 April 2021, 157 students from this cohort have arrived in New Zealand.

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## **Retention of existing international students in New Zealand**

### *Retention of students over the summer period*

For the start of the calendar year, ENZ has continued activities that focus on the retention and wellbeing of international students in New Zealand, to ensure relevant information is accessible and that opportunities for students to connect are provided.

The NauMai NZ 'Summer in NZ' pages remained live until the end of March 2021, providing information on a variety of subjects, including potential further study options, wellbeing information and advice, tips on travelling around New Zealand over the holidays, regional content, and employability skills development resources. To further encourage international students to develop new skills over the summer period the partnership with LinkedIn Learning, and access to LinkedIn Learning modules, also continued to the end of February 2021.

A WeChat livestream on New Year resolutions and goal setting ran on 12 January. This was followed by an Instagram Live ('Preparing for the year ahead') on 25 February, delivered by a student support adviser alongside three tertiary students who shared their advice and expertise about preparing for the year ahead, including academic preparation, health and wellbeing information and advice. To further build connection and also drive engagement with ENZ social media channels, we ran a competition in January, inviting international students to share on Facebook, and Instagram, travel tips and holiday images to prompt engagement with holiday and travel opportunities over summer.

The Instalive sessions delivered before the end of 2020 focused on wellbeing and connection, employability skills development, LinkedIn tips and tricks including the domestic Prime Minister's Scholarships alumni sharing their advice about summer in New Zealand remained available for students to access online.

At the end of March 10,787 members in total registered to NauMai NZ and 778 in total registered to the NauMai NZ WeChat mini programme, with 9,432 unique visitors.

### *ENZ Short term retention of students over the summer period project*

This project was successfully completed on 31 March 2021. When the project commenced on 11 October 2020, there were 42,593 people in New Zealand with a valid student visa and the project's retainment target was set of 40-50%. As of 12 April 2021, there were 25,061 people in New Zealand with a valid student visa which means that the project exceeded the retainment target by retaining 59% of students over the summer period.

## **Long-term Retention of students**

### *Regional network workshop*

Under ENZ's long term retention approach on how to work with regional economic development agencies, ENZ hosted a two-day Regional Network workshop on 28-29 January 2021. ENZ's Regional Work Plan goal is to increase the number of international students studying in the regions, therefore increasing the proportion of value generated in the regions. The focus of the workshop was for ENZ to outline its priorities for 2021 and to work with the regional economic development agencies on how best we can collaboratively support and promote international education in 2021.

The three focus areas the group discussed were student experience, social licence, and long-term retention of international students. ENZ continues to work with the Network to develop programmes of work that will align with these priority areas. ENZ is planning another regional workshop in June 2021 to kick start social licence initiatives and to review progress the Network has made since January 2021.

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## **Social licence of international education in New Zealand Workstream:**

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

- Creating a national conversation on the future state of international education in New Zealand,
- Undertaking research, which includes measuring the social, cultural, and economic contribution of international education to New Zealand.

- Broader sector value (creating broad national recognition of the wider benefits of international education)

## Key Activities

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### Highlights over the quarter

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#### **Social licence research**

In the last reporting quarter ENZ engaged The Research Agency (TRA) to source research insights to understand New Zealanders' current perceptions of international education and inform the development of a social licence strategy and messaging toolkits for peak bodies and New Zealand education providers. The research was completed and in March 2021, ENZ shared the New Zealanders' Perceptions of International Education Report to key government agencies, discussing next steps with them and made it available to stakeholders via IntelliLab.

The results of the social licence research will be utilised to shape ENZ's social licence work and strategy with stakeholders to improve awareness, support, and advocacy of international education by developing a stronger understanding of existing perceptions about international education and the alignment with embedded Kiwi cultural codes.

Findings have been encouraging with half of New Zealanders showing themselves to be positive about international education. Another 47% of New Zealanders presented as neutral regarding international education, although when prompted with the economic and societal benefits to New Zealand, were supportive. In addition, two thirds of respondents were supportive of students returning to New Zealand by the end of 2021.

#### **Create a national conversation**

Story-telling is a key element of ENZ's social licence strategy and the research insights have been utilised to shape ENZ's story-telling work under the short-term 'National Conversation' initiative, and to support the entry of the initial 250 postgraduate and PhD international student exception cohort and the 1,000 degree level or above student exception cohort. ENZ is planning to implement a short-term national conversation campaign with the support of Anthem, a communications and marketing agency.

Working with a PR agency, and incorporating TRA's research insights, ENZ is putting a narrative in place that connects with New Zealanders and demonstrates the role of international education in New Zealand's recovery. This initiative is aiming for a more coordinated, effective approach across stakeholders to amplify effort and impact. While ENZ is defining its longer-term approach, this short-term work will create a platform and begin unifying stakeholders to achieve greater social licence impact.

In addition, ENZ will increase PR activity in mainstream media in New Zealand, including feature stories and thought leadership regarding education's broad benefits and its future. Part of this profile work will demonstrate ENZ's contribution to building the future state.

ENZ's long-term initiative looks at creating more engagement, and support across a wide range of stakeholders, from Ministers to other government agencies to regional bodies and employers, parents and New Zealand students. This includes the development of a long-term national conversation framework and brand to support national conversation and social licence work.

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## International reputation Workstream:

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

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



## Key Activities

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### Highlights over the quarter

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#### **Brand positioning and protection including PR**

ENZ work is focused towards leveraging international PR channels to support ENZ's 'brand protect' objectives to maintain positive/neutral sentiment toward New Zealand and manage expectations during border closures and as New Zealand begins to open-up.

##### *Lifeswap Premiere*

ENZ, in partnership with the German Embassy Wellington, hosted the premiere of the final two Lifeswap episodes at the Embassy Theatre on Wednesday 24 March. ENZ sponsored the penultimate episode, which focused on the social and cultural benefits of international education (ENZ briefing 2021-153 refers).

More than 600 people attended the event, including representatives from the international education sector, students (both international and domestic), wider ENZ stakeholders and representatives from the German, Swiss, United States, Brazilian, Dutch, French and Saudi Arabian embassies and the European Union delegation. Officials from Ministry of Foreign Affairs and Trade (MFAT), New Zealand Trade and Enterprise (NZTE), the Tertiary Education Commission (TEC) and the Department for Prime Minister and Cabinet (DPMC) also attended.

At the event, the German Ambassador noted the importance of international education in the friendship between New Zealand and Germany. Pre-pandemic, Germany was consistently the 4<sup>th</sup> largest source country of school students in New Zealand (behind China, South Korea and Japan). The premiere served as a marketing function.

Promotion of the event is utilised in a wider PR campaign that is underway in Germany as part of ENZ's work to maintain visibility of New Zealand's brand, to ensure New Zealand continues to be positioned as a world-leading study abroad option in the future.

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#### **Global initiatives to build and strengthen partnerships and academic reciprocity**

ENZ continues to provide continuity to already existing high level academic and scientific cooperation while incorporating them as part of the long-term agenda for New Zealand education. This work includes the Kōrerorero and Masterclass Series and various academic and institutional engagement.

##### **Americas, Middle East and Europe (AMEE) Education Week**

The AMEE Education Week showcased New Zealand education offerings on the latest developments in programmes with new modes of delivery, assist partnership development whilst focusing on academic, G2G and B2B connections across the region. This was a new initiative being trialled in 2021 as part ENZ's wider events programmes to ensure our efforts and progress in areas such as diversity, equity and inclusion, sustainability, and promoting global connectedness are focused and amplified across Europe, the Americas, and the Middle East.

The Education Week programme reflected the dialling up of our international team's work and connected long-term student mobility objectives. Key messages included the quality and future focused nature of our education system, the importance of building cultural competency, sustainability through an indigenous lens, the role of international education in #buildingbridges, and New Zealand's contribution to what are global challenges. Better international alignment will ensure we can maximise strategic value and impact from our offshore presence, for greater trade benefits and education diplomacy.

Events included:

- Ensuring Indigenous Inclusion in International Education,
- Lifeswap Premier,
- Kōrerorero, conversations that matter, and
- Past and Present Transformative Student Experiences in Aotearoa.

##### *Kōrerorero: conversations that matter' series*

The Kōrerorero series uses a virtual platform to bring together experts to tackle topical issues that are important to New Zealand and our global partners. The purpose of Kōrerorero is to keep the New Zealand brand visible and showcase New Zealand. As part of the Education Week event across the Americas, Middle East and Europe (AMEE) regions, ENZ hosted its 6<sup>th</sup> episode for 2021 of the 'Kōrerorero: conversations that matter' series on 25 March 2021.

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## Highlights over the quarter

The theme for this episode was 'Sustainability in Aotearoa New Zealand through the lens of Māori values and culture'. It was promoted in Latin America, North America and Europe and was attended by 414 people including students, academics, institution representatives and government officials. The theme of mātauranga Māori (Māori ways of being and engaging in the world) carries across ENZ's internationalisation strategy including work on diversity, equity and inclusion and contributes to the Government's objectives of presenting New Zealand's education system to the world in a way that acknowledges the importance of Te Tiriti and a Māori world view. Episodes can be found here:

<https://enz.govt.nz/korerorero>.

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### Japan

*Indigenous culture focus for exchange under the New Zealand-Japan Education Cooperation Arrangement*

On Monday 22 March, ENZ and the Centre for Asia-Pacific Excellence North Asia supported the first online session between Hokkaido Noboribetsu Akebi High School in Japan and Te Kura Kaupapa Motuhake o Tāwhiuau in the Bay of Plenty. The theme of the session was indigenous culture. This was the inaugural event of the virtual collaboration and exchange outlined in the Education Cooperation Arrangement (ECA) which ENZ signed with Hokkaido Board of Education in November 2020.

ENZ's work under the ECA supports MFAT achieving its objectives, as Japan is a 'lift' market. In the coming months, seven Hokkaido schools and seven New Zealand schools will connect online around various themes including indigenous culture, agriculture, and rugby.

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### China

*Education focus for New Zealand Ambassador to China visit to Hubei province*

The New Zealand Ambassador to China visited Wuhan in Hubei Province from 19-24 March. The objectives of the visit were to thank officials for their support in repatriating New Zealanders at the onset of the COVID-19 pandemic, and to show the New Zealand government's support to deepen cooperation in education, science and innovation, and trade between New Zealand and Hubei Province.

A six-strong delegation, led by the New Zealand Ambassador and including ENZ, met with the Director General, Hubei Provincial Department of Education and reviewed education cooperation between New Zealand and Hubei in recent years. The Director General recommended increasing mutual visits between government agencies, higher education establishments as well as schools, strengthening school cooperation, including sister school relationships, encouraging teacher and student mobility, inviting language teachers from both sides to teach the other side, and setting up a cooperation mechanism.

*New Zealand-China Joint Working Group on Education and Training*

The Joint Working Group (JWG) mechanism is a key provision of the Arrangement on Education and Training between the New Zealand and Chinese Education Ministries. The JWG was established in the early 2000s for the two countries' education agencies to review progress in the education relationship, announce new initiatives and identify opportunities for further cooperation. The JWG supports information exchange and regular consultation between China and New Zealand on education matters, maintains high level official engagement, sets the direction for joint government-level projects and provides a useful structured forum for dealing with issues of student safety and quality assurance.

The New Zealand – China 9<sup>th</sup> Joint JWG on Education and Training virtual meeting took place on Wednesday 3 February 2021 chaired by New Zealand's Secretary of Education and China's Vice Minister for Education. The Strategic Cooperation Arrangement, which intends to further information sharing and recognition practices between the New Zealand Qualifications Authority (NZQA) and China Service Center for Scholarly Exchange of the People's Republic of China, was signed during the JWG.

ENZ liaised with the MoE, NZQA, and the MFAT to gain consensus on the proposed Agenda that was developed in consultation with China. The Agenda included a number of standing items as set out under the bilateral education arrangements, as well as new items reflecting the evolving nature of the relationship.

*Internationalisations Government to Government (G2G)*

On 2 March 2021, the New Zealand Ambassador to China hosted the fourteen representatives from the China Ministry of Education, and other agencies, who participated in the New Zealand-China 9<sup>th</sup> JWG on Education and Training in February 2021, at the New Zealand Embassy in Beijing. The event aimed to reflect on successful JWG engagement and discuss future collaboration, and also to demonstrate the importance of the JWG to New Zealand's education relationship with China.

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## Highlights over the quarter

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To continue follow up to the JWG, on 8 March 2021, ENZ's Chief Executive hosted the Education Counsellor from China in Wellington to discuss follow up actions and further demonstrate the importance of the education relationship between New Zealand and China.

### *New Zealand – China Tripartite Partnership funding*

ENZ is supporting New Zealand institutions to progress and grow their research opportunities in China as part of a Strategic Education Partnership between China and New Zealand. As a part of this work, the New Zealand-China Tripartite Fund was established in 2005 when the New Zealand and Chinese Ministries of Education agreed to formally support and promote tripartite relationships between New Zealand and Chinese education institutions. The Fund enables the further development of existing partnerships between a New Zealand university and two Chinese partner universities, in which a New Zealand university becomes the 'third brother' to an existing 'two brothers' agreement.

In December 2020, ENZ announced the latest round of this long-standing research partnership and on 2 March 2021, invited university researchers to submit proposals for the latest round, with up to \$20,000 available per application to support quality, high-level research and collaboration. Applications were closed in March 2021 and funding recipients will be announced in the next reporting quarter.

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## South Korea

### *Signing of Education Cooperation Agreement with Seoul*

ENZ signed an Education Cooperation Agreement (ECA) with the Seoul Metropolitan Office of Education on 15 March 2021 in a virtual signing ceremony hosted by ENZ in Wellington. The ECA seeks to strengthen education communication, cooperation and mutual understanding between the participants, and sits under the New Zealand and Republic of Korea Education Cooperation Arrangement between ministries of education signed in 2009.

The ECA aims to deliver specific outcomes for both Seoul and New Zealand, including information sharing and online language exchange in the school sector, in partnership with the North Asia Centre of Asia-Pacific Excellence. There are also plans to establish a framework for activities to adapt to the current state of progressing bilateral education initiatives during the COVID-19 pandemic. New Zealand's Ambassador to the Republic of Korea was among MFAT's representatives at ENZ's office in Wellington for the virtual signing ceremony.

### *Ed tech companies in South Korea*

ENZ worked closely with other agencies to contribute content for an article about three New Zealand ed-tech platforms Kami, Education Perfect and Code Avengers. ENZ has been engaging with the edtech community as New Zealand's international education service exporters can provide unique content, learning management systems, learning experiences and analytics to change the way education is delivered.

Kami has more than 500,000 users and transforms the way students and teachers engage and collaborate with digital information. Education Perfect is Otago's fastest growing tech business putting it in the running for the Deloitte Technology Fast500 Asia-Pacific. It has more than one million students in more than 1,700 schools in 20 countries that are regularly logging into Education Perfect's learning platforms. Code Avengers is an online digital technology education service based in New Zealand, creating learning platforms.

The article was published in mid-March 2021 in the quarterly magazine of Seoul Education Research and Information Institute, and included testimonials and images provided by the New Zealand ed-tech platforms. 8,800 printed copies of the magazine have been distributed to schools and teachers in Seoul.

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### *Webinar with the University of Malaysia*

ENZ's second 'Indigenous Conversations' webinar with the University of Malaysia's Centre for Indigenous Studies was held on 30 January. The webinar, titled 'Indigenous Activism Through the Arts', featured indigenous artists and academics from New Zealand and Malaysia.

The webinar is part of ENZ's work to strengthen research and academic cooperation for the New Zealand education sector<sup>1</sup>, including in the areas of diversity, equity, inclusion and indigenous initiatives. ENZ delivered the opening remarks, alongside New Zealand's High Commissioner to Malaysia.

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<sup>1</sup> This work supports Goal 3 (Develop Global Citizens) of the *International Education Strategy 2018-2030* which aims to have international education provide stronger global connections, research links and partnerships for New Zealand.

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## Highlights over the quarter

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### United States of America

#### *Proposed co-funding partnership*

In January 2021, ENZ met with the United States of America's (US) National Science Foundation (NSF), an independent federal agency established to promote the progress of science and to advance the national health, prosperity, and welfare. NSF raised the idea of a co-funding partnership, noting that NSF could sign one with ENZ with funding for the US-side if funding from New Zealand was available. The NSF has confirmed that along with consultation with US tribal communities,<sup>2</sup> there is strong interest in working with New Zealand.

With the new incoming US administration, Minister Mahuta's interest in indigenous engagement, and s9(2)(f)(iv)

. They see the proposed multiplier event, taking place in the next reporting quarter, as a precursor to s9(2)(f)(iv)

#### *Events around diversity, equity and inclusion*

ENZ held two events around diversity, equity, and inclusion, aimed at study abroad advisors and students who are interested in studying abroad in the future.

An event on "Ensuring Indigenous Inclusion in International Education" was held on 24 March. It featured a Q&A discussion with an Omaha Tribe and a Gilman Scholarship recipient and a Chochiti Pueblo and Navajo Nation and a Go Overseas Scholarship recipient.

The "Past and Present Transformative Student Experiences in Aotearoa" discussion held on 26 March included four panellists, three of whom had previously studied in New Zealand and one who is a Fulbright Scholar and re-entered New Zealand under the 250 PhD and Master's students, cohort.

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### ENZ Recognised Agency (ENZRA) Programme

ENZ supports education agents via activities such as the ENZRA Programme, webinars and funding provided to agents to undertake small scale promotional/awareness raising activities. ENZ runs an agent survey to find out about agents' current sentiment and how ENZ can better support them. Over the quarter, a survey of over 440 education agents globally has produced valuable insights on ENZ-led initiatives, training and support that would most benefit agents. Over half (57%) of those surveyed are members of the ENZ Recognised Agency (ENZRA) programme.

The survey results demonstrated that ENZ-supported webinars, online and hybrid events were most valuable to agents, followed closely by digital collateral and marketing material, support for student-facing activities, business to business events with education providers and training. Insights from the survey will drive our activities, tailored communications and training initiatives that are best aligned with agent needs.

The current agent engagement plan focuses on supporting the ENZRA Activity Fund in New Zealand, and offshore with marketing initiatives, driving the agent engagement plan through a range of initiatives, and ongoing recognition of the role of education agents.

The ENZRA Activity Fund supports high-quality, top performing ENZRA agencies who have worked effectively to showcase New Zealand education and support the New Zealand International Education Strategy's goals. It includes a series of promotional initiatives funded or co-funded by ENZ for selected onshore and offshore ENZRA. ENZRA agencies are invited to submit proposals/expressions of interest which showcase their abilities in increasing awareness for New Zealand as a study destination.

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<sup>2</sup> In the US, a tribal community is an American Indian tribe, Native American tribe, Alaska Native village, tribal nation or other group/community of Native Americans.

<sup>3</sup> 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.



## Innovation Workstream:

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The workstream supports the international education sector to adopt non-traditional approaches to the delivery of international education. Its overarching objective is to build sector resilience and diversify our offerings to broaden and enhance the benefits that international education brings to New Zealand and New Zealanders over the longer term. The workstream achieves its outcomes through five initiatives:

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

## Key Activities

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### Highlights over the quarter

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#### **Test, develop and deliver new products and services to increase resilience**

##### *Global Competency Certificate*

The Certificate is an online programme for secondary school students that teaches self-awareness, empathy for other cultures and ways to build bridges in multicultural settings. ENZ initiated the development of a customised version of AFS's Global Competency Certificate (GCC), tailored for virtual delivery to Year 10 school students in Viet Nam and New Zealand.

In February 2021 ENZ wrapped up the Viet Nam 2020 Global Competency Certificate project with the Palmerston North and the Manawatu school clusters, culminating in the graduation ceremony on 26 January at The Asian International School (IPS) in Bien Hoa, Viet Nam. The first virtual class under the Viet Nam – New Zealand Global Competency Certificate project was run on 2 November 2020.

ENZ's work on this initiative was outlined in the 11 December 2020 Fortnightly Report (ENZ ref 2021-078). This project shows ENZ's commitment to support New Zealand schools' activities in Viet Nam and promotes the development of global citizens in New Zealand.

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#### **Global New Zealand Education Pathways**

In December 2020, ENZ launched the Global New Zealand Education Pathways initiative, which is a partnership with the United Kingdom-based qualifications provider University Consortium (NCUK), to allow students to begin their New Zealand education experience offshore. The Partnership Agreement oversees the launch of Global Education Pathways via partnership with the university sector and multinational pathways organisation NCUK, and aims to build the university sector's transnational education capability and intellectual property over time. It enables students from more than 30 countries to begin their New Zealand education journey through NCUK networks while borders are closed. ENZ is working towards developing a study centre incentives strategy, and marketing and campaigns are being implemented for qualification pathways that enable students to begin their studies abroad.

In February ENZ completed international media launches of the Global New Zealand Education Pathways initiative. The launches in China, Japan, Korea, Vietnam and Thailand generated 96 media articles that were viewed more than 9 million times through to 5 February 2021, featuring media quotes and the announcement of the more than \$300,000 in university scholarships per year. The launch included the scholarship announcement, a new 'Pathways' page on the [Study in New Zealand](#) website, and a supporting partnership signing between ENZ and NCUK. ENZ uploaded a wider range of offshore pathway programmes onto its Study In New Zealand website to support a May-June marketing campaign for students entering offshore education programmes from September 2021 onwards. Phase 2 of the project includes Pathway Campaign Part 1 (April-May) and Part 2 (May-June), including dedicated New Zealand Study Centres.

ENZ launched the second phase of the initiative <https://enz.govt.nz/news-and-research/media-releases/innovative-enz-universities-partnership-creates-pipeline-of-international-students/> by inviting proposals to establish New Zealand Centres in priority offshore markets. China, India, Indonesia, Korea, Thailand and Viet Nam have been selected as priority markets by a joint University-ENZ Project Group, although proposals from other markets will also be considered. The Centres will support the Recovery

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## Highlights over the quarter

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Plan through building the sector's transnational education capability and providing greater resilience to future student mobility impacts.

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### Exploring online learning – Unified Digital Learning Platform (UDLP)

To explore online delivery via the UDLP, and facilitate digital transformation to future proof online delivery from all parts of New Zealand's education sector, ENZ is developing three Prototypes as part of a Business Case for the MoE and the Treasury. We will provide an update in the next reporting quarter.

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### Prime Minister's Scholarships

Following a meeting with you on 29 March, ENZ has provided input to the MoE on potential options for repurposing funding originally appropriated for the Prime Minister's Scholarships for Asia and Latin America (PMSA, PMSLA) for 2020/21 for international education related initiatives with the MoE providing you with advice on options.

ENZ started two workstreams within our scholarship improvement programme. Martin Jenkins has been commissioned to develop a monitoring and evaluation framework for the PMSA and the PMSLA, including developing more transparent assessment criteria.

The Ministry of Foreign Affairs and Trade (MFAT), the MoE and sector representatives have been invited to participate in the project reference group. This will also enable ENZ to tell a compelling and data-driven story about the value of the PMSA and PMSLA to New Zealand and New Zealanders and contribute to ENZ's broader impact work. The ENZ scholarship team is undertaking a full review of internal systems and processes to identify opportunities to streamline and provide an enhanced process for applicants (individuals and groups).

The MoE has agreed to work with ENZ on progressing a broader review of the PMSA and PMSLA, although the timeframe of this work has not been agreed.

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## Risks and Issues Management

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

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

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

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## Our organisational development

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### Building ENZ's capability Workstream

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

### Key Activities

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#### Highlights of achievements over the quarter

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##### **Ngā Manapou**

We have progressed the roll-out of Ngā Manatōa (the “champions” who most exemplify our values/ngā Manapou), having presented a format to ENZ's Leadership Team. A “prize” of pounamu has been commissioned and will be presented by a Leadership Team member several times annually.

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##### **Appropriate systems and processes in place**

Internationally based staff are gradually receiving COVID-19 vaccinations. One of our s9(2)(a) staff s9(2)(a) now has COVID-19 and we have approved a contribution towards supply of oxygen supplies for the NZ Inc operations s9(2)(a) . Flu vaccines for New Zealand based staff have been booked.

A suite of guidelines for managing projects within ENZ (“The ENZ Way”) has been further developed, taking into account feedback from recent projects. This was presented to the ENZ Leadership Team in March and will be presented to staff in the next reporting quarter.

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##### **Rautaki Māori**

With the secondment of our Chief Advisor Māori to NZTE, we have secured the services of Karl Wixon for the duration of the secondment. Karl will focus on the Minister's (draft) Letter of Expectations as a guide to ensuring ENZ is aligned with those expectations.

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## Financial performance to 31 March 2021

STATEMENT OF FINANCIAL PERFORMANCE	For the 9 months to 31 March		
	Actual 2020/21	Budget 2020/21	Actual 2019/20
<b>\$000s</b>			
<b>Operating Revenue</b>			
Revenue from the Crown - Operating	23,262	22,974	20,578
Revenue from the Crown - EEL	2,450	2,450	2,449
Other revenue	213	327	3,031
<b>Total operating revenue</b>	<b>25,925</b>	<b>25,751</b>	<b>26,058</b>
<b>Scholarship Revenue</b>			
Revenue from the Crown - scholarships	1,163	3,038	3,263
<b>Total scholarship revenue</b>	<b>1,163</b>	<b>3,038</b>	<b>3,263</b>
<b>Operating Expenditure</b>			
Personnel costs	9,998	10,221	9,749
Other expenses	9,259	10,459	13,336
Depreciation & amortisation expenses	201	229	226
<b>Total operating expenditure</b>	<b>19,458</b>	<b>20,909</b>	<b>23,311</b>
<b>Scholarship expenditure</b>			
Scholarship expenses	168	1,400	1,847
<b>Total scholarship expenditure</b>	<b>168</b>	<b>1,400</b>	<b>1,847</b>
<b>Net surplus</b>	<b>7,462</b>	<b>6,480</b>	<b>4,163</b>

STATEMENT OF FINANCIAL POSITION	As at 31 March		
	Actual 2020/21	Budget 2020/21	Actual 2019/20
<b>\$000s</b>			
<b>Assets</b>			
Total current assets	13,425	9,344	8,622
Total non-current assets	397	450	615
<b>Total assets</b>	<b>13,822</b>	<b>9,794</b>	<b>9,237</b>
<b>Liabilities</b>			
Total current liabilities	3,334	4,000	2,456
Total non-current liabilities	216	-	171
<b>Total liabilities</b>	<b>3,550</b>	<b>4,000</b>	<b>4,073</b>
<b>Net assets</b>	<b>10,272</b>	<b>5,794</b>	<b>6,610</b>

The budget has been revised and the Prime Minister's Scholarships for Asia and Latin America revenue \$1.875m will be returned to the Crown following Cabinet's agreement to reallocate the funds.

This leaves \$13.5m to be spent on international education activities over the remaining three months to record a nil surplus. We are closely monitoring remaining expenditure, all the projects that ENZ are committed to deliver by 30 June 2021 have been contracted and are underway.

- The Innovation work programme including the Unified Digital Learning Platform project, repositioning the Study in New Zealand and China website and undertaking various enhancements and ecosystem development to develop the digital student enrolment

process. This will include a waiting room experience / pipeline e.g virtual study tour, and to enable access to a more diverse set of education products. The work programme is on track to meet its programme milestones with their payments being made by 30 June 2021.

- Major seed funding agreements across 13 New Zealand regions are being finalised. These include a range of long-term retention, student experience and social licence initiatives.
- Peak body work programmes have been finalised and financial support will be provided to SIEBA, ISANA and English New Zealand by 30 June 2021.
- Brand protection and development activity, ENZ commissioned research on COVID-19 perceptions and Brand tracking will be delivered by contracted vendors in June 2021.
- Agent events in-market and agent appreciation / co-investment is scheduled for June 2021 to support those events held in June 2021, remains on track to be delivered.
- Student wellbeing initiatives are planned for May and June 2021.
- Pilot extensions for the Global Competency Certificate and the Enroller project building on the research project completed in 2019, looking to ensure that the school sector has access to the digital capability needed for a successful rebuild and will be delivered by 3<sup>rd</sup> parties from May 2021.

## ENZ's financial review

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

s9(2)(f)(iv)

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

Expenditure is planned to be allocated by the ENZ business plan workstreams and highlight the difference between ENZ's role to provide information, services and investment to the international education sector, versus running ENZ and the Prime Minister's Scholarships.

The financial review will provide a four-year view to capture the change from the previous financial operating model to the future state new model, starting in 2019/20. ENZ will present the financial review to you and the Ministry of Education. Monitors and Policy teams will provide written advice to you on the Financial Review.

The results of the financial review will be reflected in ENZ's planning for the coming year. The financial review and ENZ's four-year strategic planning will identify the key initiatives, deliverables and investment needed in ENZ to lead the transformation and rebuild of the international education sector.

## ENZ's Impact, Performance and Organisational measures

### Impact measures

	Target 2020/21	2019/20 Full Year Result	2020/21 YTD Result	On Track <sup>4</sup>	Comment
International student perceptions of education quality.	<b>2020:</b> 8.2 out of 10	<b>2020:</b> 7.8 out of 10		●	The result will be reported in Q4.
The percentage of international students who were satisfied or very satisfied with their overall experience.	<b>2020:</b> Increase	88%		●	ENZ plans to run the survey in semester one 2021. Fieldwork will be in the field in May 2021.
The economic value from New Zealand's international education sector.	<b>2020:</b> Maintain	<b>2019:</b> \$5.23 billion		●	The result will be reported in Q4.
The economic value per international student.	<b>2020:</b> Increase	<b>2019:</b> \$44,951		●	The result will be reported in Q4.
The percentage of international students enrolled to study outside Auckland.	<b>2020:</b> Increase	<b>2019:</b> 45%		●	The result will be reported in Q4.
The percentage of the international education sector's economic value coming from New Zealand's top two markets.	<b>2020:</b> Decrease	<b>2019:</b> 50.4% of the onshore economic value to New Zealand		●	The result will be reported in Q4.
Awareness of the contribution of international education to New Zealand.	<b>2019/20:</b> Increase	Not surveyed <sup>5</sup>		●	The result will be reported in Q4.

<sup>4</sup> **Key:** ✓ on track to achieve full year target      ✗ target not met  
 NA result is not yet available, but will be included in the Annual Report 2020//21

<sup>5</sup> Due to the significant impact of COVID-19, ENZ did not survey New Zealanders about their perceptions.

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



## Performance measures

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

	Target 2020/21	2019/20 Full Year Result	2020/21 YTD Result	On Track <sup>6</sup>	Comment
Percentage of facilitated customers that agree ENZ's services and support have added value to their organisation.	≥ 75%	Not surveyed <sup>7</sup>		●	The result will be reported in Q4.
Percentage of Active Visits on ENZ's studyinnewzealand.govt.nz website.	≥ 75%	77%	78%	✓	
Number of registrations to ENZ's Student Membership Programme through studyinnewzealand.govt.nz website.	80-100,000	93,052	53,873	✘	Not on track due to changed focus for this year on retaining students in New Zealand and brand protect activity undertaken to maintain awareness of the brand.
Number of registrations to NauMai NZ.	2,800	6,263	3,320	✓	
Number of key messages about the benefits to New Zealand from international education delivered by third parties.	100	127	99		Not on track yet due to shift in focus for the Comms team. Proactive media storytelling has been largely shifted into the Social Licence workstream under the ENZ Business Plan 2020/21.
Percentage of users satisfied with the information and intelligence provided by ENZ.	≥ 87% of users rate it as good or higher	Not surveyed <sup>8</sup>		●	The result will be reported in Q4.
Percentage of Prime Minister's Scholarship recipients who report making five or more	≥ 60%	55%		✘	There are no outbound scholarships due to border closures. ENZ does not expect to be able to report on this measure for 2020/21.

<sup>6</sup> **Key:** ✓ on track to achieve full year target

✘ target not met

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

<sup>7</sup> 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.

<sup>8</sup> Due to the significant impact of COVID-19 on the international education sector and the cross-agency work to provide communications and support to the international education sector, ENZ did not survey the sector about ENZ's work.

	Target 2020/21	2019/20 Full Year Result	2020/21 YTD Result	On Track <sup>6</sup>	Comment
professional/business connections during their time on scholarship.					
Percentage of Prime Minister's Scholarship recipients who report making five or more academic connections during their time on scholarship.	≥ 60%	53%		*	There are no outbound scholarships due to border closures. ENZ does not expect to be able to report on this measure for 2020/21.

### Activity indicator

	2020/21 Activity Standard	2019/20 Full Year Result	2020/21 YTD Result	On Track <sup>9</sup>	Comment
Number of New Zealand International Doctoral Research Scholarships funded.	10-20	20	10	✓	There are 10 remaining NZIDRS scholars in NZ.

### Organisational capability

	2020/21 Target	2019/20 Full Year Result	2021/21 YTD Result	On Track <sup>9</sup>	Comment
Employee engagement.	Increase	66% favourable		●	The result will be reported in Q4.

<sup>9</sup> Key: ✓ on track to achieve full year target

\* target not met

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