

Education New Zealand

Quarterly Report for 1 July to 30 September 2022

**THINK
NEW**



Proactive release



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Proactive release

Executive summary

This report summarises the performance of Education New Zealand Manapou ki te Ao (ENZ) in delivering its strategic priorities. These priorities have been determined in line with ENZ's strategic four-year plan, and align with the *New Zealand International Education Strategy 2022-2030* (NZIES). ENZ's performance is assessed against ENZ's *Statement of Intent 2022-2026*, *Statement of Performance Expectations 2022/23*, ENZ's Business Plan 2022/23 and your Letter of Expectations.

In quarter one, our focus was on:

- understanding and rebuilding sector capability through sustained engagement with the sector
- mobilising the sector to access key markets through strategic in-market engagement and agreements
- rekindling brand awareness of New Zealand through our global marketing and PR initiatives
- supporting student experience.

New and returning international students arriving in New Zealand were warmly welcomed by their institutions, towns and cities, and ENZ was part of many of these events. A highlight was the event co-hosted by the University of Auckland and ENZ in early September which the Prime Minister and you attended.

During this quarter, agencies worked closely together on planning for your travel to Asia in October to ensure the trip delivered opportunities to demonstrate that New Zealand is 'open for business'. We also focused on building our capability to deliver on our goals and objectives, including strengthening our project management and business planning capability, and taking on the operational management of the Ministry of Foreign Affairs and Trade's (MFAT's) Manaaki New Zealand Scholarship Programme.

We expect the impacts of our work will become more evident as the year progresses, and as we continue to see international students return to New Zealand.

International education operating context

Globally, potential international students are actively seeking opportunities to travel and study offshore. International education destination countries are seeking to attract these students, and there are a number of similar challenges and opportunities at play in different countries: visa processing, ease of travel, and opportunities to continue living and working in the destination country.

The perception of the New Zealand brand has largely maintained its position, visa application numbers are increasing, and ENZ has stepped up its marketing activity, both digitally and in person.

ENZ operating context

ENZ strategic four-year plan

The finalised NZIES has provided a clear path for ENZ's forward planning and delivery of activities for the 2022/23 year, the first year of our Statement of Intent for 2022-2026. We will focus on delivering against our impact measures and our performance measures for 2022/23, while also noting that we deliver a new Statement of Intent for 2023-2027.

ENZ delivery against Letter of Expectations

We have focused on strengthening our engagement and cooperation with other government agencies, including the New Zealand Qualifications Authority (NZQA), Immigration New Zealand (INZ) and others. During the quarter, we appointed two Māori Advisors in newly established roles, to help ensure ENZ is giving appropriate consideration to its Te Tiriti obligations. We have also worked closely with the Ministry of Education (MoE) to improve transparency in our investments and operations.

Work undertaken in quarter one

This section outlines activities undertaken throughout the quarter, linking them to our strategic objectives and the New Zealand International Education Strategy 2022-2030.

Tono

Aotearoa New Zealand's unique education offerings and services are highly sought after by international learners

I AM NEW global marketing campaign

The first phase of the I AM NEW campaign focused on raising awareness of New Zealand as an education destination was successfully completed on 31 August 2022.

From 1 June, when the paid component of the campaign commenced targeting students (Tertiary and Schools YR9+) and parents in China, India, USA, Thailand, Vietnam, Germany, Brazil, Japan, Korea, and Colombia, we have:

- generated duplicated reach outside China of 117.6 million and within China of 53.5 million
- generated 651,000 engagements across ENZ owned I AM NEW social media campaign
- sent 20,800 emails with an open rate of 54.2% and a click rate of 15.6%
- the view through rate (VTR) on the campaign videos was an excellent 53%. This measures the percentage of people that watched the entire video. Previous ENZ campaigns have had an average VTR of 31-41%.

The campaign saw around 20,000 visits a day to the campaign page on the Study with New Zealand website. New users to the Study with New Zealand website were up 496% compared to the three months prior to the campaign starting.

During September and October, we have bridged phases one and two of the I AM NEW campaign with a 'maintenance' level of brand awareness activity. Phase two of the I AM NEW campaign will be split between continuing to drive brand awareness and driving sign ups and enquires on Study with New Zealand.

EAIE 2022

ENZ attended the annual European Association for International Education (EAIE) conference and exhibition in Barcelona from 13-16 September, which attracted more than 6,300 participants from more than 90 countries. EAIE is the largest business-to-business conference and international education event in Europe. This was the first in-person EAIE event since 2019.

ENZ supported the New Zealand education delegation, comprising representatives from all eight universities and Te Pūkenga. ENZ hosted a New Zealand education networking event with New Zealand institutions for more than 100 key stakeholders.

New Zealand's branded pavilion at EAIE provided a platform for delegates to meet with current and potential partners and agents. We are surveying the participants about the outcomes of their engagement at EAIE. Initial indications were positive; New Zealand providers had busy schedules and were keenly sought after by international partners.

New Zealand Study Abroad month in the United States

The New Zealand Study Abroad Month ran from the middle of September to the middle of October, aiming to promote New Zealand as a study abroad destination for potential international students in

the U.S. The focus for the promotion is people working in study abroad offices, and who advise students on study abroad options.

Videos promoting New Zealand and New Zealand institutions were released each week during the month. Feedback from institutions in the US was positive, they are looking forward to seeing students travel to New Zealand. For example, Dickinson, Union and Colgate Colleges, which are small, private, highly ranked liberal arts colleges, are pleased they will now be able to run their own programmes in New Zealand.

Education Tauranga delegation in South Korea

Education Tauranga led a delegation of representatives from 23 primary and secondary schools and the University of Waikato to South Korea from 19 to 25 September. The visit aimed to reconnect with stakeholders in Seoul and Busan, and to showcase the region's unique education proposition to Korean families. The delegation was supported with ENZ regional funding.

Education Tauranga has an immersion policy where one international student per country is placed in each class (years 1-8) to support English language development and cross-cultural connections.

The delegation met with families and prospective students at Education Fairs and hosted international student alumni at the New Zealand Residence in Seoul for an evening reception on 23 September. The evening was supported by ENZ.

China: Profiling New Zealand for potential international students

In July, ENZ supported an online webinar to prepare Chinese students who would be travelling to New Zealand. The webinar was organised by the New Zealand Chinese Students' Association, the Chinese Consulate in Auckland and the Auckland Chinese Students and Scholars Association.

Just under 10,000 people were online on the first night and 5,000 on the second. ENZ showcased resources for information such as the NauMai NZ WeChat programme, as well as general tips and advice about living and studying in New Zealand.

China: Alumni event to build ties with New Zealand

New Zealand hosted more than 100 past, current and future international students, as well as representatives from China's Ministry of Education and other key government agencies, in Beijing in July. The event was part of the ongoing celebration of the 50th anniversary of the establishment of diplomatic relations between New Zealand and China.

The event was organised by ENZ with support from the MFAT, New Zealand Trade and Enterprise, and Tourism New Zealand to promote New Zealand's education offering to prospective students and help cultivate a strong alumni presence in China, whose stories can be shared through NZ Inc channels.

New Zealand successes at PIEoneer Awards 2022

New Zealand's international education sector achieved global recognition at the annual PIEoneer Awards in London in September:

- the University of Auckland's India Support Programme won 'Marketing campaign of the year'
- Ngā Hononga-ā-Kiwa (University of Waikato), was highly commended in the 'Championing diversity' category
- Intern Abroad HQ was highly commended in the 'Real life learning' and the 'Sustainability international impact' categories.

These Awards are highly sought after as they recognise innovation and achievement in global education. Around 550 people from around the world, including our Chief Executive, Grant McPherson, attended the event in person, with hundreds more online.

The New Zealand Global Competence Certificate, which is a collaboration between ENZ, AFS Intercultural Programs and Massey University Te Kunenga ki Pūrehuroa, was a finalist in two categories of the awards.

ENZ sponsored the PIEoneer of the Year Award, for the organisation or individual who can demonstrate their commitment to improving the global education industry and show how their entry has genuinely changed the landscape we operate in. Grant McPherson presented this year's award to AMOpportunities from the United States, which aims to provide clinical training for schools, hospitals, and students globally.

Creating networking opportunities for agents and providers

In late July, ENZ hosted a networking dinner and mini fair in Auckland for ENZ Recognised Education Agents (ENZRA), regional representatives, and New Zealand providers to foster the renewing of connections as borders open and New Zealand reconnects to the world. Approximately 60 people attended the dinner and 90 people attended the fair with representation from all sub-sectors. Representatives from INZ and Te Pūkenga presented to the audience. Feedback has been positive from both agents and providers about the opportunity to create and strengthen relationships to support the rebuild of the sector.

Workshop for ENZRA Agents

ENZ hosted its annual ENZRA workshop for India based recognised agents in Mumbai. The focus was the vision for the New Zealand education sector, promotional strategy, and the next steps around the border opening. The workshop was attended by 23 of the 42 India-headquartered ENZRA agencies. The workshop included an engaging live Q&A session with INZ.

Webinars for Agents

ENZ, with INZ, ran two webinars for education agents via AgentLab on 8 and 13 September. The purpose of the sessions was for INZ to share good practice, including tips and tricks, on submitting good decision-ready visa applications. More than 300 highly engaged attendees were present across the two sessions. ENZ continues to run webinars for agents as part of our engagement approach.

Calendar of events

The ENZ calendar of events for education providers to attend from July – December 2022 was published on the ENZ website on 6 July 2022. ENZ's investment in events reflects feedback from the education sector on priority markets and student sectors.

Pono

Aotearoa New Zealand delivers high-quality and diverse education experiences that are sustainable, globally competitive and deliver value to all involved

Welcome events for international students

ENZ has supported and participated in events hosted by cities, towns and providers to welcome international students to New Zealand including:

- co-hosting an event with the University of Auckland on 2 September to welcome international students, with both you and the Prime Minister attending. The event was covered in national media, and both your speech and the Prime Minister's speech emphasised the importance of international students in New Zealand's education system.

- on 10 August, ENZ joined the welcome for international students organised by Study Northland on the Waitangi Treaty Grounds. There were 70 international students from Whangarei Girls High, NorthTec, Kerikeri High School and Springbank School at the event. After the powhiri each student was presented with a Tū Ngātahi pin pack and welcome certificate, and then had the opportunity to explore the history and relevance of the Treaty Grounds.
- an event run by Wellington International Students' Association for 140 international students from eight countries over the course of two days
- two mayoral welcomes hosted by Christchurch City Council and ChristchurchNZ – one for international school students at Ara and the Council buildings, and one for tertiary students at Tūranga (the new city library). ENZ's Chief executive attended the function for tertiary international students, which was predominantly students from Cohort 4. Around 140 international students and staff from tertiary providers across the wider Christchurch region attended the function. The mayor her worship Lianne Dalziel, and Malcolm Lyall Deputy Mayor of the Selwyn District Council addressed the students.

New Zealand International Students Association (NZISA) Roadshow

NZISA delivered a Roadshow in Dunedin, Christchurch, Wellington and Auckland to raise NZISA's visibility with international students across the country and across the sector and coincided with NZISA's five-year anniversary.

This was a student-led, student-delivered initiative, with support provided by ENZ, and offered an opportunity for students to connect with each other, student association representatives, and government agencies and NGO organisations who work alongside international students.

At each event, new and returning international students were welcomed, local speakers from an international or migrant background shared their experiences and insights, and the evenings concluded with an opportunity for networking and information sharing.

Feedback from students was positive, with real appreciation for the kōrero of the guest speakers and the opportunity to connect with other students. The final roadshows event in Wellington took place on 6 October.

New Zealand Chinese Students' Association event

In July, ENZ participated in the Professional Network Event organised by the New Zealand Chinese Students' Association at the University of Auckland. More than 200 students attended the two-night in-person event, with more than 30 companies and organisations sharing career guidance and providing networking opportunities. ENZ attended to raise awareness of the work we do supporting international students, including promotion of the NauMai NZ WeChat Mini-Programme for Chinese students and the broader NauMai NZ platform.

Brazilian students travel to New Zealand

One hundred secondary school students aged between 14 and 16 years old from Paraná (southern Brazil) undertook a three-month study experience in New Zealand, at 11 secondary schools around the country, between August and October 2022. The programme was fully funded by the Paraná Government through its Secretary of Education. The students represented all regions of the state, which has a population of around 11 million people and an economy with a strong emphasis on agribusiness. The immersion allowed them to experience the New Zealand education system, lifestyle, and Māori culture. The students were farewelled at events throughout New Zealand in October 2022, including a virtual event hosted by ENZ for students who did not attend an event locally.

NZIEC KI TUA: New Zealand International Education Conference 2022

The Conference attracted 1,065 registered delegates, held virtually from 15 to 19 August. This was our 29th conference, and it was the largest and most complex NZIEC we have run.

NZIEC at a glance:

- 1,065 registered delegates
- 105 sessions delivered across the week
- 101 speakers
- 11 MCs and facilitators
- 3 studios in operation, in Pōneke Wellington, Tāmaki Makaurau Auckland and Ōtautahi Christchurch
- 88% delegate satisfaction for keynote and plenary sessions (rated good or very good).

The conference explored the theme of *Towards Recovery: Reflect, Reconnect and Renew*. The virtual format meant NZIEC KI TUA reached a wider audience across the sector than an in-person event and we received significant positive feedback on the event.

South Island Sector Engagement

ENZ's Chief Executive, Grant McPherson; General Manager, Marketing and Communications, Geoff Bilbrough; and Business Development Manager Sector Engagement, Andy Walker; spent three days engaging with the sector in the South Island, including meeting with:

- University of Otago, University of Canterbury, Lincoln University
- Te Pūkenga – Ara and Otago Polytechnic
- Study Dunedin/Enterprise Dunedin including extended school representation
- ChristchurchNZ
- PTE's – UCIC and Talent International Institute
- English New Zealand and ITENZ representatives
- Christchurch Educated representatives.

At that stage, providers were cautiously optimistic about student numbers for 2022, saying they had adequate applications in the pipeline to be comfortable with progress (50% of pre-pandemic levels for some).

International Education Peak Body Forum Meeting – 14 September

ENZ hosted the third international education Peak Body Forum for 2022 in-person on 14 September. Attendees included peak body representatives, INZ, Ministry of Business, Innovation and Employment (MBIE), MoE, and NZQA.

The agenda included:

- an update from MoE on the implementation of the NZIES and the Export Education Levy review
- a discussion around the NZIES and sector capability needs to rebuild. This item was led by the Peak Bodies
- an NZQA update on the Code of Practice for Pastoral Care and the online delivery rules consultation
- an INZ update covering visa processing, sector reporting and decline trends
- a sector-led discussion around taking the Pathway Visa forward
- an introduction to the new ENZ Regional Director Greater China Michael Zhang.

Product Innovation Fund (PIF) recipients announced

In August, ENZ announced the recipients of the [International Education Product Innovation Fund](#) as part of the Diversification of International Education Products and Services Programme of work which is being funded through the COVID-19 Response and Recovery Fund.

Just over \$1.6 million in funding was awarded to the seven successful pilot projects, with individual funding ranging from \$200,000 to \$450,000. The successful recipients and their projects are:

- BOMA New Zealand – a global cohort-based course for rugby coaches developed in partnership with The Canterbury Crusaders
- Te Whare Hukahuka – an online indigenous eCommerce programme
- Chasing Time English – English language learning based on original, high quality drama content
- Te Kaihau Education – global enterprise coaching and peer group learning
- Virtual Medical Coaching – a virtual reality (VR) childbirth simulation for midwifery students
- Banqer – the evolution of a financial literacy platform for global learners
- Te Whare Wānanga o Awanuiārangi (with a number of United States based universities) – Iwi taketake: Co-construction of an Indigenous Postgraduate Curriculum.

Some of these projects support ENZ's efforts to work more closely with Māori education providers and iwi, align with Ministerial expectations and existing work around indigenous education, and complement the programme's funding of other Māori entities (Te Whare Hukahuka and Tokona te Raki). An introductory meeting of the Māori recipients of the PIF was organised to meet ENZ Manapou ki te Ao Manukura Ed Tuari at Tokona te Raki in Christchurch to explore Kaupapa alignment and opportunities.

Several recipients spoke about their projects at NZIEC KI TUA 2022.

FutureLearn Pilot 2

Following the first Rented Online Education Platform pilot in 2021, ENZ is running a second pilot with [FutureLearn](#) [ENZ 2122-114 and 2122-121 refer]. This involves a 12-week global promotional campaign that launched on 4 July to promote the New Zealand collection of courses available on the platform. This second pilot has strong sector participation, increasing from 11 to approximately 28 providers. The pilot also included a number of non-traditional providers such as Te Papa Museum.

Mission New Zealand

A soft launch of the [Mission NZ platform](#), with support from the Product Innovation Fund, was released on 30 June to test functionality and generate interest from a wider group of providers. The platform includes the world's first 360° virtual powhiri. There is currently a limited number of courses compiled around key themes of culture, tech innovation, creativity and sustainability. However, the number of participating providers and courses will grow over coming weeks and months, before ENZ runs a promotional campaign.

Hono

Aotearoa New Zealand makes the best possible use of its international education expertise to improve educational outcomes, establish partnerships and grow global connections

APAC TVET Forum

The second APAC TVET Forum was held virtually on 14-15 September. You opened the forum with a pre-recorded speech. More than 2,000 registrations were received from over 60 countries, with significant interest from across the Pacific.

A key theme was the importance of close relationships with industry, particularly in terms of apprenticeships. For some participants, long-standing perception that higher education is more important than vocational education is still a concern. Student panel participants talked about the confidence and support that parents provided when making decisions to enter vocation education programmes.

As this is the only forum of its type in the region, ENZ is exploring options for building on the interest that the forum has generated.

LSAMP-Nice/ENZ agreement

In late September, ENZ arranged for the use of the New Zealand Embassy in Washington DC for the Louis Stokes Alliance for Minority Programs-NSF International Center of Excellence ([LSAMP-NICE](#)) to host their Annual General Meeting (AGM) and Conference. There were 60 attendees from LSAMP institutions across the United States, international partners including the University of Toulouse and the French Embassy, and a delegation from Te Kāhui Amokura delegation. ENZ Manukura – Chief Advisor Māori, Ed Tuari, and other ENZ staff also attended the AGM and the meetings with the delegation. The AGM concluded with the signing of the ENZ and LSAMP-NICE Education Cooperation Agreement (ECA).

The ECA is:

- believed to be the first official international ECA written in both te reo Māori and English
- ENZ's first ECA to be signed by the Manukura – Chief Advisor Māori
- a demonstration of the deepening links ENZ is building for New Zealand education in the US.

NZ-China Higher Vocational Education Summit

As part of the APEC TVET Forum, the New Zealand-China Higher Vocational Education Summit featured a dedicated virtual room for Chinese presenters and audience members. The Summit provided a platform to:

- share New Zealand's recent experience of vocational education reform with China
- nurture the bilateral TVET cooperation, giving recognition to the number of joint programmes between Te Pūkenga subsidiaries and vocational institutions in China.

Keynote speakers from China included CHEN Dali, Deputy Director General Department of International Cooperation and Exchanges from the China Ministry of Education, and presenters from industry including Wang Jinsheng from Qingdao Technical College. The Summit was a useful follow-up to China's World Vocational Technical Conference on 19-20 August.

NZ-China Early Childhood Education Symposium

The third annual New Zealand – China Early Childhood Education Symposium was held on 23 September, attracting more than 80,000 viewers on livestream, 200 attendees live in Guilin, China and 43 New Zealand attendees on webinar.

While in Guilin, there was also a visit to Kuiguang School, a private school in Guilin that already has existing partnerships with New Zealand schools, regularly sending short term student groups to New Zealand pre-COVID-19. They look forward to continued exchanges and spoke very warmly of New Zealand.

Bilateral Ministerial meeting and ECA signing with China Education Minister

Following your bilateral virtual ministerial engagement with People's Republic of China Education Minister Huai Jinping on 23 August, the China Ministry of Education posted an article in Chinese media about the event, stating "the two sides exchanged views on deepening Sino-New Zealand educational exchanges and cooperation." The article went on to cite the milestone of 50 years of diplomatic relations, valued by both New Zealand and China.

Delegation of Italian officials and students to New Zealand

A group of 20 students, teachers and Ministry of Education officials from Italy visited New Zealand between 29 August and 7 September as part of a global citizenship and social action initiative funded by the Italian Ministry of Education: "Humans as Nature / Rights of Nature" 2022 is an international hackathon that brings together high school students aged 16-18 from around Italy and from Whanganui, to exchange and collaborate on the main environmental challenges of their countries.

The Italians were inspired by New Zealand's pavilion at Expo 2020 Dubai, featuring the Whanganui River. Their schools are heavily focused on internationalisation. ENZ connected the group with Whanganui, and they were hosted by the iwi and by the Economic Development Agency there. They are also interested in global citizenship, innovation and entrepreneurship.

ENZ welcomed the delegation in its Wellington office on 29 August, with the Italian Ambassador to New Zealand speaking at the event.

Virtual ECA signing ceremony with Ministry of Energy and Mineral Resources, Republic of Indonesia

On 24 August 2022, ENZ signed an ECA with Apparatus Human Resources Development Centre, Ministry of Energy and Mineral Resources of the Republic of Indonesia (the MEMR).

The ECA will establish and strengthen educational cooperation, particularly around international education and exchanges in the area of energy transitions and renewable energy. The ceremony was witnessed by New Zealand Ambassador to Republic of Indonesia, H.E. Kevin Burnett, and representatives from the Embassy of the Republic of Indonesia in New Zealand, who joined the event online.

A Partnership Arrangement between MEMR and the New Zealand Ministry of Foreign Affairs and Trade signed in 2018 set out the principles and understandings between the ministries to support training and capacity building in the Indonesia Geothermal Sector. The Partnership Arrangement did not specifically cover education cooperation. MEMR approached ENZ this year requesting a formal arrangement to be set up relating to their scholarship study programme that could support Indonesia's Toward Net Zero Emissions Road Map Programme.

The MEMR has committed to three employees enrolling in the University of Auckland programmes Master of Energy and PhD in Energy as a pilot in 2023. The MEMR will cover the cost of the scholarships and facilitate the scholarship selection process. Five representatives from the University of Auckland, including Faculty of Energy and the International Office, joined the ECA signing ceremony virtually. Universities New Zealand also attended, and ENZ will work with them to expand the opportunity to host scholarship recipients from Indonesia to all New Zealand universities.

Meeting with the President of Samsung Electronics in Wellington

While visiting New Zealand, the President of Samsung Electronics, In Yong Rhee wished to promote Samsung Electronics' Corporate Social Responsibility programme [Solve for Tomorrow](#). This is a nationwide competition challenging New Zealand's next generation of innovators to unleash their creativity and use STEAM (Science, Technology, Engineering, Arts and Maths) to help improve their communities.

ENZ and the Ministry of Education (MoE) hosted the visitors at the Wellington ENZ office on 22 August for a courtesy call requested by the Korean Embassy in New Zealand. Samsung currently partners with Museum of Transport and Technology in Auckland and is interested in working with the New Zealand government to grow and expand the programme.

ECA signing ceremony to begin METEOR delegation

On 8 August, ENZ signed an Education Cooperation Agreement (ECA) with METEOR, a consortium of 11 Malaysian universities. The signing ceremony was witnessed by Senator Jaziri Alkaf Abdillah Suffian, a member of the Senate Parliamentary Select Committee for Socio-Cultural, Communication and Education. This was followed by presentations from ENZ, MoE, Te Pūkenga and Universities New Zealand providing an overview of New Zealand's education system including the Reform of Vocational Education. You met with the delegation later in the day as a courtesy call.

The ECA signals a formal partnership and provides a foundation for ENZ to cooperate with METEOR to support New Zealand institutions potentially partnering with METEOR to deliver joint undergraduate or postgraduate programmes in Malaysia (including via online delivery) and explore executive development programmes with a particular interest in micro-credentials.

Launch of joint research projects with IIT Delhi

ENZ hosted an evening event with IIT-Delhi on 5 July to launch the joint research projects between IIT Delhi and New Zealand universities which are part of the New Zealand Studies Centre at IIT Delhi. The Centre aims to promote relationships of understanding and co-operation across diverse fields of academic and other sector engagement between New Zealand and India, with a strong focus on joint research projects between IIT Delhi (IITD) and New Zealand universities.

The evening formalised the Joint Seed Money Funding Scheme (MFIRP). The funding granted for the project amounts to a total of US\$10,000 for one year project duration (USD 5,000 equivalent in INR from IITD and USD 5,000 equivalent in NZD from the respective NZ university).

New Zealand Global Competence Certificate (NZGCC)

The NZGCC cultural exchange programme is a partnership between ENZ and AFS Intercultural Programs, Inc. It is currently delivered by Massey University. Graduation from the programme is celebrated and a number of these ceremonies have occurred in this last quarter.

India

On 16 July, ENZ hosted an online NZGCC graduation ceremony for 35 high school students from India and New Zealand who formed the 'Women of the Future' cohort from the 'Women of the Future' event in India where Minister Priyanca Radhakrishnan participated [ENZ 2122-109 refers]. These students join more than 1,000 NZGCC graduates to date. They spoke of finding their voice, learning tangible skills they are already applying, skills they will carry with them for life, and an appreciation of cultural differences. In addition, the Indian students have now experienced studying with New Zealand, learnt about New Zealand culture from peers, and had the opportunity to make friends in New Zealand.

A further 20 undergraduate students from India and New Zealand graduated with the NZGCC in an online ceremony on 24 September. The New Zealand student representative noted they had taken the programme because of a desire *to be successful in intercultural workplaces*.

On 10 September, ENZ held a further online graduation ceremony for approximately 140 students from Indonesia, Philippines, Thailand, Viet Nam, and New Zealand.

Japanese teachers

Ten teachers in Japan received their NZGCC in a graduation ceremony at the New Zealand Embassy in Tokyo on 23 September. Both the Deputy Chair of AFS Intercultural Programs, Makiko Haraga, and the NZGCC facilitator from Massey University, Donna Bliss, provided congratulatory remarks. Teachers from Atsugi, Tokyo, and Ichihara participated in the NZGCC as part of ENZ's support for education cooperation arrangement partners in Japan.

Prime Minister's Scholarships to Asia and Latin America (PMSA/LA) – Individual scholarship round

Applications for the individual Prime Minister's Scholarships for Asia and Latin America closed on 31 August. We received:

- 110 applications for the PMSA with a total funding request of \$1.81 million for the \$1.35 million available funding
- 55 applications for the PMSLA with a total funding request of \$573,252 for the \$500,000 available funding.

Māori applications comprised 17% of all applications across both scholarships. The age of applicants ranges from 18 to 66 years. The most popular destination country in Asia is South Korea and the most popular destination country in Latin America is Colombia. The selection panels took place at the end of October 2022, with announcements about the successful recipients planned for mid- to late-November.

PMSA Group programme

The first PMSA group programme to travel since 2020 departed for Indonesia on Saturday 20 August. Ten Whitecliffe students, who were supposed to travel in 2020, spent six weeks learning about the cultural and economic significance of modest fashion at the Islamic Fashion Institute in Bandung. The students visited designers, manufacturers, exporters, and retailers and learn about traditional batik design.

Festival for the Future

On 30 and 31 July, ENZ partnered with Inspiring Stories Trust as a gold sponsor of Festival for The Future, New Zealand's largest social innovation summit, for more than 1,000 participants across New Zealand as well as online participants around the world.

The annual event showcases leadership and innovation and seeks to amplify rangatahi and minority voices to demonstrate leadership in New Zealand around topics such as climate action, diversity and inclusion, sustainable development, and other similar issues.

PMSA alumnus and Young New Zealander of the year, Ezra Hiriwani, was one of the opening keynote speakers. Ezra spoke directly about his experience as part of a PMSA programme to China and the importance of Global Citizenship to address the issues of our lifetime.

ENZ supported the *Global Impact Award*, awarded to Courtney Davies, a young New Zealander leading environmental programmes for young people across New Zealand and Africa, with a focus on sustainable change and action. ENZ provided ten international students and five Prime Minister's Scholarship Recipient alumni with tickets to attend the event.

Kono

ENZ's core capabilities nourish the organisation and support the delivery of all Strategic Objectives under the Four-year plan

Visa Dashboard

The inaugural International Student Visa Update (Visa Dashboard) was produced by INZ on 22 August and sent to you as an Information Update by the MoE. The most recent dashboard is attached to each Fortnightly Report.

INZ reports it is conducting a targeted, post-decision Risk Monitoring and Review (RMR) programme. This aims to ensure appropriate risk management approaches are being taken, as volumes increase and teams develop market knowledge.

This inaugural Visa Dashboard forms a baseline for numbers received, decisions made, and visa processing timeliness. MoE and ENZ will continue to monitor trends, including visa processing times.

The inaugural student visa processing report for international education peak bodies was released by INZ on 8 September. Sector representatives responded positively to this INZ report at the Peak Bodies Forum held on 14 September.

Outcomes and ongoing actions from the Chief Executives' Group

The CEs' Group met on 22 September and considered:

- The New Zealand International Education strategy 2022-2030 (NZIES)
- A paper proposing a refresh of the Terms of Reference (ToR) for the CEs' Group
- The INZ student visa dashboard which has been developed for you and Minister Wood
- the ENZ-commissioned Kantar Brand Health survey, which highlighted New Zealand's brand strength being maintained.

INZ/ENZ joint leadership teams meeting

ENZ hosted the second INZ-ENZ joint leadership teams meeting for 2022 on 21 September. INZ was represented by its head, Alison MacDonald, Chief Operating Officer, and other senior officials. Useful discussions included using ENZ communications channels to convey key INZ messages, ENZ's market prioritisation work, INZ's continuing programme of targeted post-decision risk monitoring and review, and an overview of productive discussions between INZ and Te Pūkenga about visa processing and agent management.

Building ENZ's capability to meet its commitment to Te Tiriti o Waitangi

ENZ welcomed two new Māori advisors in August 2022 to the Rautaki Māori team, increasing in-house expertise and enabling the development of the cultural capability and confidence of ENZ's global whānau.

ENZ was part of the extra special year that marked the 50th anniversary of the Māori Language Petition, an event that led to many of the initiatives that we have today, including **Te Wiki o te Reo Māori** itself. It is also 35 years since te reo Māori became an official language of Aotearoa New Zealand. Staff were involved in activities across the week that provided them with opportunities to participate and strengthen their language skills, and to learn about Te Ao Māori

ENZ's Rautaki Senior Advisor attended the World Indigenous Peoples Conference on Education (WIPCE) in Adelaide in September as part of the Rautaki team intention to build indigenous

networks. This conference is a focal point for international indigenous scholarship along with the connectivity of tertiary education around the world. Iwi/hapū Māori attended which provided opportunities to link ENZ to Māori education and educational providers.

Manaaki New Zealand Scholarship Programme (MNZSP)

On 5 July 2022 ENZ and MFAT formalised the partnership for ENZ to deliver the MNZSP, with the signing of the Partnership Arrangement and Partnership Agreement. ENZ took over operational management of the programme on 1 November.

From early 2023, ENZ and MFAT will commence work on the improvement programme to enable a shift to a future state which has been jointly developed between ENZ and MFAT. This programme of work will include both a technological system upgrade as well as operational policy shifts to strengthen students' experiences.

Providing information and intelligence for the sector

In August, ENZ released the latest issue of The Insight Story (issue 5), its data-based snapshot report of the international education sector, to New Zealand's international education sector. The Insight Story is published on Intellilab (ENZ's digital data, research, and insights platform) and distributed to approximately 25,000 stakeholders, including New Zealand education providers, government agencies, education agents, and regional economic development agencies. It is also promoted to ENZ's LinkedIn followers – there are currently around 28,000 followers. There have been 394 downloads since its release.

With ENZ and the sector focusing on student attraction, the content in this issue was weighted toward data and analysis related to the value of a New Zealand education, and student interest in New Zealand.

Risks and Issues Management

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 2022/23.

To maintain high level oversight over ENZ's strategic objectives and manage risks and issues effectively, ENZ's strategic issues and key risks are regularly reviewed by the Audit and Risk Committee which provides independent assurance related to ENZ's strategic risks.

ENZ implemented a new risk reporting dashboard for the 2022/23 financial year to provide the senior leadership team, the Audit and Risk Committee, and the Board with a summary of the mitigations taken to manage strategic issues and risks, to ensure plans are in place and are effective. The senior leadership team independently inputs into the dashboard monthly and reviews it as a collective for reporting through to ENZ's governance groups.

The Board and the senior leadership team held a risk management workshop with an independent risk consultant in August 2022, to discuss risk management and the principles underpinning good practice. The Audit and Risk Committee will consider suggestions raised during the workshop and recommend any amendments in practice for the Board's consideration at the Board's December risk discussion.

We will brief you on substantial shifts in ENZ's strategic issues and risks, and we will continue to discuss these with our monitoring agencies and other agencies, as appropriate.

Financial performance to 30 September 2022

STATEMENT OF FINANCIAL PERFORMANCE	For the 3 months to 30 September		
\$000s	Actual 2022/23	Budget 2022/23	Actual 2021/22
Operating Revenue			
Revenue from the Crown - Operating	7,811	7,812	7,632
Revenue from the Crown - EEL	-	-	817
Other revenue	164	70	31
Total operating revenue	7,975	7,882	8,480
Scholarship Revenue			
Revenue from the Crown - scholarships	1,221	938	938
Total scholarship revenue	1,221	938	938
Operating Expenditure			
Personnel costs	3,868	3,940	3,872
Other expenses	2,757	3,472	3,716
Depreciation & amortisation expenses	58	58	47
Total operating expenditure	6,683	7,470	7,635
Scholarship expenditure			
Scholarship expenses	443	-	-
Total scholarship expenditure	443	-	-
Net surplus	2,070	1,350	1,783

STATEMENT OF FINANCIAL POSITION	As at 30 September		
\$000s	Actual 2022/23	Budget 2022/23	Actual 2021/22
Assets			
Total current assets	7,941	5,761	6,872
Total non-current assets	254	87	365
Total assets	8,195	5,848	7,237
Liabilities			
Total current liabilities	3,021	3,050	2,442
Total non-current liabilities	208	-	215
Total liabilities	3,229	3,050	2,657
Net assets	4,966	2,798	4,580

At the end of the first quarter ENZ's year-to-date surplus of \$2.070m was \$0.719m higher than year-to-date budget. We are largely tracking in line with our strategic framework expenditure budget. The variance above was somewhat driven by income being received in advance of expenditure as we prepare to start delivering the New Zealand Manaaki Scholarship programme.

STATEMENT OF CASH FLOW	For the 3 months to 30 September		
\$000s	Actual 2022/23	Budget 2022/23	Actual 2021/22
Cash flows from operating activities			
Receipts from the Crown	9,032	8,750	8,570
Receipts from Other revenue	55	70	31
Payments to suppliers, employees and IRD	(6,625)	(7,412)	(7,588)
Net cash flow from operating activities	2,462	1,408	1,013
Cash flow from investing activities			
Net increase/(decrease) in cash	(538)	1,408	1,013
Cash at the beginning of the year	6,129	830	914
Cash at the end of the quarter	5,591	2,238	1,927

Term deposits of \$2m as at 30 September 2022 (\$5m: 30 June 2022) invested across two banks see table below.

Account & Bank	Maturity dates	% pa	% of total	\$m
Call - ANZ	On Call	2.40%	74.01%	5.695
Fixed - ASB	Maturing on 25 November 2022	2.35%	25.99%	2.000
Total Cash at Bank and Term Deposits			100.00%	7.695

ENZ's Impact, Performance and Organisational measures

Impact measures

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On Track ¹	Comment
A. International student perceptions of education quality.	Increase	7.7 out of 10	7.7 out of 10		○	ENZ expects to appoint a supplier for this survey in the coming months. We will determine when the next survey will take place following that appointment. We anticipate some changes to the survey that may impact the outcomes of related performance measures.
B. Number of students studying towards a New Zealand qualification onshore and offshore ²	Establish baseline	N/A	Not yet available		○	This measure relies on enrolment data for the 2022 calendar year. This data will be available in 2023.
C. The economic value from New Zealand's international education sector. ³	Increase	\$3.03 billion	Not yet available		○	ENZ is currently analysing the 2021 enrolment data to provide this full year result for 2021/22. Enrolment data for 2022 will be available in 2023.
D. The international education sector diversifies its offerings for international students	Establish baseline	N/A	Not yet available		○	This measure relates to ENZ providing a set of recommendations by September 2023 in line with the conditions of its CRRF funding.
E. The percentage of the international education sector's economic value coming from outside New Zealand's top two markets.	Increase	53%	Not yet available		○	ENZ is currently analysing the 2021 enrolment data to provide this full year result for 2021/22. Enrolment data for 2022 will be available in 2023.
F. The percentage of international students enrolled to study outside Auckland. ⁴	Increase	50%	Not yet available		○	ENZ is currently analysing the 2021 enrolment data to provide this full year result for 2021/22. Enrolment data for 2022 will be available in 2023.
G. The percentage of international students who were satisfied or very satisfied with their overall experience. ⁵	Establish baseline	85%	Not a comparable measure		○	ENZ expects to appoint a supplier for this survey in the coming months. We will determine when the next survey will take place following that appointment. We anticipate some changes to the survey that may impact the outcomes of related performance measures.
H. New Zealand institutions have improved quality of connections with international partners in key markets	Establish baseline	N/A	N/A		○	The methodology for this measure is currently being finalised.
I. Increase in participation in the Prime Minister's Scholarships for Asia and Latin America by Māori and Pasifika	Establish baseline	N/A	N/A		○	This measure will be reported at the end of the 2022/23 financial year.

Performance measures

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On track	Comment
Percentage of Active Visits on ENZ's studywithnewzealand.govt.nz website. ⁶	≥ 75%	N/A	N/A	19.11%	✘	This result has been driven by the Global I AM NEW campaign. In addition, some channels (Email, Organic, Direct) that have historically driven a high active visit %

¹ Key: ✓ on track to achieve full year target ✘ not on track to achieve full year target ○ Not measured in this quarter but expects to be reported in Q4.

² This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2022/23. A new baseline is to be established in 2022/23.

³ This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2022/23. The target in the Vote Tertiary Education Estimates 2021/22 was \$1.200million

⁴ This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2022/23. The target in the Vote Tertiary Education Estimates 2021/22 was to at least maintain the 2021/22 percentage.

⁵ This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2022/23. The target in the Vote Tertiary Education Estimates 2021/22 was to have an increase from 2021/22 result.

⁶ '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.

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On track	Comment
Deliver recommendations on diversified products and services per CRRF funding requirements	Draft report completed by June 2023	N/A	N/A		✓	have performed below expectations this quarter. We are investigating this further. ENZ is on track to complete its work programme and deliver its recommendations by the end of the 2022/23 financial year.
Number of impactful global connections to New Zealand providers in key markets. ⁷	Establish baseline	N/A	N/A		○	The methodology for this measure is currently being finalised.
Supporting the rebuild of the international education sector by leading the implementation of the government's Strategic Recovery Plan's 'Transforming to a more sustainable future state' workstream, with:						
- Improved confidence and resilience within the international education sector ⁸⁹	Achieved	N/A	N/A		○	We are in the process of refining the industry survey for the current financial year. We expect to finalise the survey in the coming months.
- facilitating cross-government collaboration via the Chief Executives' Group and strengthening links with international Ministers ¹⁰	Achieved	N/A	4 meetings		✓	One meeting scheduled and delivered for this period. Further commentary on this meeting is included in the body of this report.
The percentage of facilitated customers that agree ENZ's services and support have added value to their organisation. ^{11 12}	≥ 85%	N/A	82%		○	We are in the process of refining the industry survey for the current financial year. We expect to finalise the survey in the coming months.
The percentage of users satisfied with the information and intelligence provided by ENZ	≥ 87% of users rate it as good or higher	N/A	83%		○	We are in the process of refining the industry survey for the current financial year. We expect to finalise the survey in the coming months.

Organisational capability

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On track	Comment
J. ENZ staff have undertaken te reo Māori and cultural training	Establish a baseline	N/A	N/A	43	✓	At the end of September 2022, 43 staff had completed the Te Rito cultural training. This is from a headcount of 94 staff and accounts for staff changes over the quarter.
Decrease ENZ's gross carbon emissions ¹³	Establish a baseline	N/A	N/A		○	

⁷ ENZ defines an 'impactful global connection' through a framework that accounts for reciprocity, a clear student, academic or research exchange or benefit, timeframe for potential outcomes of the connection and potential economic value to the institution and/or New Zealand.

⁸ This measure is intended to reflect ENZ's role in leading the 'Transforming to a more sustainable future state' workstream as set out in the Recovery Plan. ENZ works with the sector to support a diversified international education sector. surveys the international education sector annually to understand the current state of sector performance. As a result of COVID-19, Education New Zealand will specifically include questions about capacity and capability, as well as confidence.

⁹ This result also reports on a measure from the 2022/23 Estimate of Appropriation

¹⁰ This result also reports on a measure from the 2022/23 Estimate of Appropriation

¹¹ '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.

¹² This result also reports on a measure from the 2022/23 Estimate of Appropriation

¹³ ENZ will set a gross emissions reduction target for 2025 and 2030 consistent with a 1.5 degree pathway, measured against 2022/23 as a base year and based on ENZ's reduction potential.