

22 May 2018

██████████
 ████████████████████
 ████████████████████

withheld under s9(2)(a) of the OIA

Dear ██████████

I refer to your official information request received by Education New Zealand (ENZ) on 9 April 2018. This response relates to your request, as follows:

All written advice from Education New Zealand to Ministers between 2011 and 2016 (inclusive) and the present regarding quality assurance of education providers, and/or EER process, and/or changes to Rule 18, in relation to the India and China student markets.

The following table summarises our decision on the release of the eight papers within the scope of your request that are held by ENZ.

Title	Decision on release
International education trends and opportunities	Name and phone numbers redacted under s9(2)(a) of the Official Information Act to protect the privacy of natural persons. Provider names redacted under s9(2)(b)(ii) to protect commercially sensitive information.
Market diversification in the international education industry (12 May 2015)	There is only one paragraph in this paper that is within the scope of your request. The relevant excerpt, paragraph 8, is provided below.
<p><i>“The proposed change to Rule 18 (English language requirements) is expected to reduce the number of Indian students coming to New Zealand. With India representing 60 percent of the 2014 growth, this could lead to a flattening or decline in the industry’s growth for 2015 and 2016. However the impact of the rule change should be balanced with the priority of increasing the number of high-value, high-quality learners. The dynamics of the Indian market, along with the possible impact of the rule change, underline the need to diversify New Zealand’s portfolio and focus on the growth of high-value students.”</i></p>	
Official Information Act request: ENZ marketing budget in India and China and complaints against private training establishments and agents	Released with individuals’ names redacted under s9(2)(a) of the Official Information Act to protect the privacy of natural persons.

Indian student visa numbers to 30 June 2016	Phone numbers redacted under s9(2)(a) of the Official Information Act to protect the privacy of natural persons.
Recent trends in international education growth	No redactions.
India student market update	Name and phone numbers redacted under s9(2)(a) of the Official Information Act to protect the privacy of natural persons. One redaction under s6(a) to avoid prejudice to the international relations of the Government of New Zealand.
New Zealand Residence Programme changes: Impact on the international education industry	Phone numbers redacted under s9(2)(a) of the Official Information Act to protect the privacy of natural persons. Provider names redacted under s9(2)(b)(ii) to protect commercially sensitive information.
Aide memoire: Further advice on potential impact on export education of remuneration thresholds for migrants under the Skilled Migrant Category	Provider names redacted under s9(2)(b)(ii) to protect commercially sensitive information.

In preparing this information release, ENZ has considered the public interest considerations in section 9(1) of the Official Information Act.

You have the right to seek an investigation and review by the Ombudsman of this decision. Information about how to make a complaint is available at www.ombudsman.parliament.nz or freephone 0800 802 602. If you wish to discuss this decision with us, please feel free to contact Angela Meredith, Accountability Manager on [REDACTED] or angela.meredith@enz.govt.nz

withheld under s9(2)(a) of the OIA

Please note, Education New Zealand now proactively publishes OIA responses. Your name and contact details will be removed from this response before it is published on our website.

Yours sincerely,



Grant McPherson
Chief Executive
Education New Zealand

Education New Zealand Briefing

Title:	International education trends and opportunities
Date:	1 October 2013
Priority:	High
Security level:	In-confidence
ENZ ID no:	1314-61

Action sought

Addressee:	Action sought:	Deadline:
Minister for Tertiary Education, Skills and Employment	Provide feedback on the attached project scope and A3, and discuss the project scope at the International Education Senior Officials' Group meeting on 2 October 2013	2 October 2013
Enclosure:	Yes	Round robin: No

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact:
Grant McPherson	Chief Executive	[REDACTED]	[REDACTED]	x
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	OIA s9(2)(a)

The following departments/agencies have seen this report

<input type="checkbox"/> ERO	<input checked="" type="checkbox"/> MBIE	<input checked="" type="checkbox"/> MFaT	<input type="checkbox"/> MoH	<input checked="" type="checkbox"/> MoE	<input type="checkbox"/> MSD
<input checked="" type="checkbox"/> NZQA	<input type="checkbox"/> NZTE	<input checked="" type="checkbox"/> TEC	<input type="checkbox"/> TPK	<input type="checkbox"/> Treasury	<input type="checkbox"/> Audit NZ

Minister's office to complete

<input type="checkbox"/> Approved	<input type="checkbox"/> Declined	<input type="checkbox"/> Noted	<input type="checkbox"/> Needs change
<input type="checkbox"/> Seen	<input type="checkbox"/> Overtaken by events	<input type="checkbox"/> See Minister's notes	<input type="checkbox"/> Withdrawn

Comments:

Education New Zealand Briefing

Title:	International education trends and opportunities
Date:	1 October 2013
ENZ ID no:	1314-61

Recommendations

We recommend that you

- a. **provide feedback** on the attached project scope and A3 documents
- b. **discuss** the project scope at the International Education Senior Officials' Group meeting of 2 October 2013

Grant McPherson
Chief Executive

Hon Steven Joyce
Minister for Tertiary Education, Skills and Employment

— / — / —

Purpose

1. At your meeting with International Education Senior Officials' Group (IESOG) on 7 August 2013, you agreed that a stocktake of the barriers and opportunities of the current global international education environment was timely and necessary.
2. Attached to this briefing is a document that outlines the scope and timeframe for this project and an A3 that outlines some of the emerging trends and opportunities.
3. There will be an opportunity to discuss this project at the next IESOG Ministers' meeting on 2 October 2013.

Background

The Leadership Statement

4. The Leadership Statement was released in September 2011. It sets out the government's objectives for the international education industry to 2025, under three Goals:
 - Goal 1 - the increased economic value derived from international students in New Zealand
 - Goal 2 - the enrolment of students and delivery of services offshore
 - Goal 3 - the post-graduate and settlement outcomes and New Zealanders' skills and knowledge derived from international education experiences.

The project

5. The aim of this project is to focus on what has changed in the external global environment over the last two years and the impact of this on New Zealand's market share. Competitor analysis, emerging trends and the future impact on the New Zealand industry, under various scenarios, will be considered.
6. Current government policy and operational settings and the potential impact on student recruitment will also need to be considered as part of this project, to ensure that incentives and sanctions are in place that provide the right environment for both student demand and industry supply.
7. Implications for the IESOG cross-agency work programme will also be identified.

Appendix One: Project scope - International education trends and opportunities

Purpose

1. The aim of this project is to assess changes to the global operating environment over the last two years, emerging trends and what opportunities they present for the New Zealand industry in the future.

Background

The Leadership Statement

2. The Leadership Statement is one of the key government growth platforms that international education contributes to. The export education¹ industry is also a key contributor to the Government's Business Growth Agenda – Building Export Markets target to grow the ratio of exports to 40 percent of GDP. In addition, international education has an important contribution to make to the export growth objectives in the New Zealand Inc strategies for China, India and the Association of Southeast Asian Nations.
3. The Leadership Statement was developed in 2010/11, using data collated by the Ministry of Education, Organisation for Economic Cooperation and Development, and the United Nations Educational, Scientific and Cultural Organisation. Forecasts and projections by a range of international agencies, including the British Council and IDP Australia, were also considered.

The last two years

4. The global international education environment that was in place when the Leadership Statement was developed is changing rapidly and becoming more complex and competitive.
5. This assessment will focus on what these changes mean for student demand and expectations and what opportunities have emerged.

Project scope

6. The following table shows the scope of this project:

In scope for this project	Out of scope
<p><i>Part 1</i></p> <ul style="list-style-type: none"> a. emerging trends in the global international education market b. current international projections for demand and competitor analysis c. supply information about the current capacity and capability of the New Zealand international education industry 	<p>Goal 3 - an assessment of the level of internationalisation of New Zealanders, post-graduate research and work and employment outcomes.</p>

¹ In this paper the term "international education" is used to refer to the industry as a whole and activities that are bigger than bringing students to New Zealand to study. Student recruitment activities (Goals 1 and 2) are more accurately termed "export education".

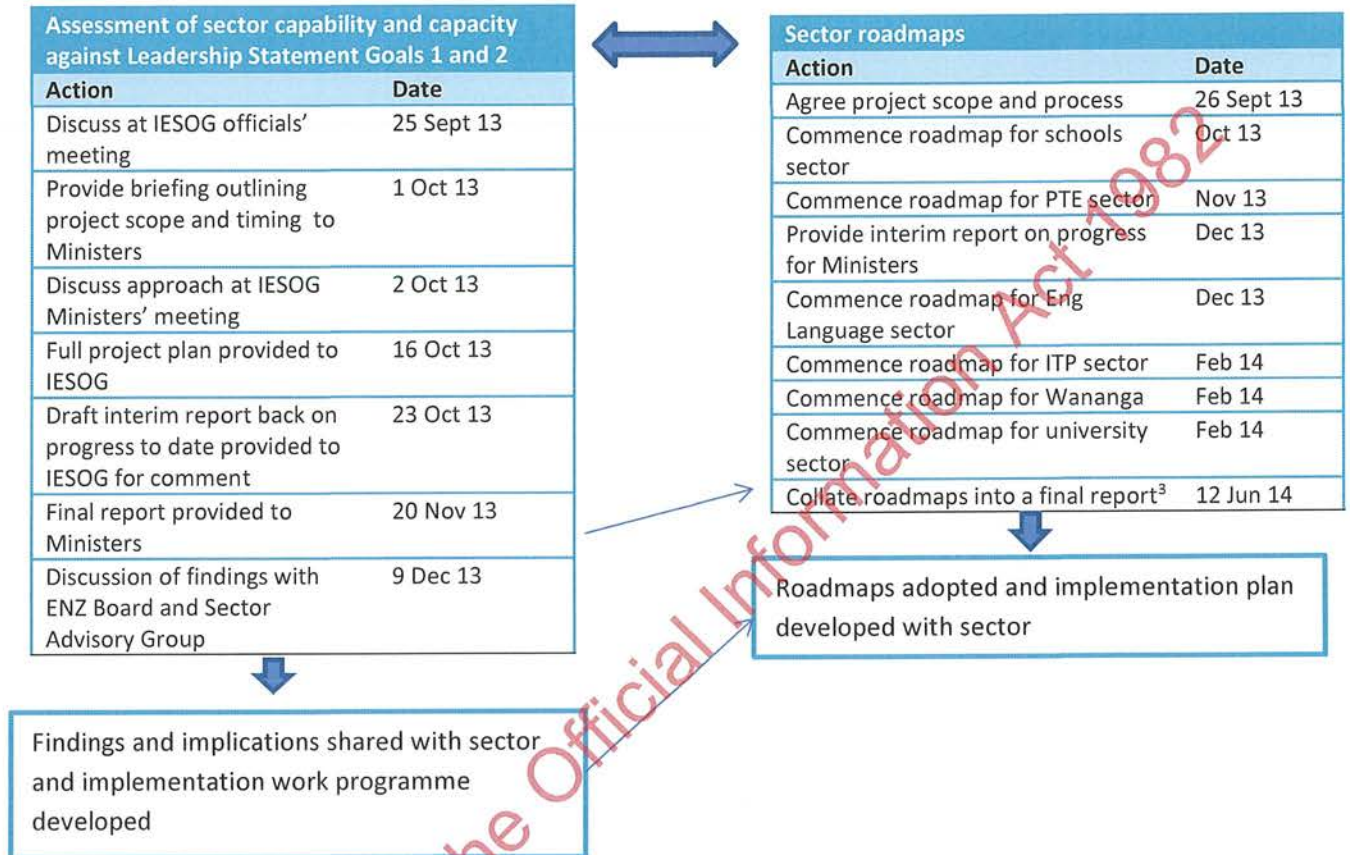
In scope for this project	Out of scope
<p><i>Part 2</i></p> <p>a. sector by sector supply from a global perspective, eg:</p> <ul style="list-style-type: none"> • products and services • funding and capital • capability • capacity • incentives and sanctions. <p>b. government support and services, eg:</p> <ul style="list-style-type: none"> • regulatory policy • quality assurance • private public partnerships and investment • talent identification • buildings and infrastructure • technology. <p>c. scenarios and options for growth and implications for both government and the industry</p> <p>d. implications for government international education agencies and the IESOG work programme going forward.</p>	

Link to sector roadmaps

7. In parallel, and in conjunction with key industry groups, Education New Zealand is developing a series of sector roadmaps.
8. These roadmaps will provide a view of how each sector of the international education industry sees the future and how each will need to adapt to a unique set of challenges over the next two to 10 years. Each sector roadmap must be developed with and owned by the relevant sector participants and be considered a realistic blueprint for growth.
9. The sector roadmaps will not be fully complete until the end of 2013/14. Linking these sector roadmaps with this assessment will provide a comprehensive view of the opportunities for future growth and how each sector is going to take advantage of these.

Timeline²

Continuous feedback process



² The sector roadmap timeline may be amended once the project is underway and we have a better understanding of how long each map will take to produce, allowing for a collaborative process with the sector.

³ We have also identified the importance of producing a view of the education technology/ business sector; however, due to the diversity of this group, a different process will be used to build a picture of opportunities and potential.



Emerging global trends

Megatrends

1. Increasing global demand for education
2. Globally 2025 international students will double
3. Asian countries developing own educational capabilities & hubs
4. Increased focus on quality and expectations of educational service
5. Increased challenge for small countries to attract talent and get brands recognised
6. Need to shift global learning to place people live
7. Globalisation of education delivery
8. Discontinuity through technology of way education is delivered
9. English as a source of competitive advantage
10. Safety, security and stability will become really important
11. Competitors putting huge investment into marketing

12. Importance of country and institution brand
13. Corporate education growth
14. Significance of university ratings
15. Opportunities for core skills development in developing countries
16. Need to balance emphasis back to vocational training
17. Need for innovative products = continuous innovation
18. Private providers of education [risk of low quality providers & opportunities through being more innovative]
19. Role of technology in education delivery
20. Global mobility of skilled labour = global recognition of qualifications
21. Instant global communication – about good and bad!

Commentary:

Student mobility

- Since the 1990s a relatively constant 2% of students have been studying outside of their home country. The British Council calls this the “stable propensity to study abroad”.
- Some commentators think this percentage will decrease because of the increasing quality of domestic higher education world-wide and the global recession making studying abroad less affordable.

Recent commentary on projections for higher education:

“Improved domestic provision of higher education, increased intraregional student mobility and the overall growth of Transnational Education (TNE), will meet the growing demand for higher education in 2020 say over 20 global higher education leaders.

Growth in global HE international enrolments will decline from 5-6% to 1-4% annually in 2020 as demand in the developed world slows and supply in BRIC countries increases”

- Other commentators think there is reason to be optimistic for four reasons:

- continued growth of the middle classes in Asia
 - increasing numbers who can afford international studies
 - economies demanding more skilled labour
 - labour market continuing to pay a premium for quality higher education graduates.
- Increases in domestic education participation in China, India and Indonesia and Brazil could add an additional 25 million to the global student population by 2020.
- Large numbers are predicted to study overseas from Nigeria, Malaysia, Pakistan, Turkey and Saudi Arabia.
 - United States and Australian projections to 2020 assume that half of the growth in international students to 2020 will be people wanting an English-language programme of study. An additional 750,000 students would want a higher education credential under this scenario. Australia projects receiving an additional 100,000 to 120,000 international students by 2020, but would then reach capacity at 22.7% of total higher education students. This presents an opportunity to capture students who may have been considering an Australian study option.

- Canada does not have the same capacity constraints. Increasingly Canada and Singapore are our primary competitors. We need to identify our points of difference and relative strengths against these countries, or potential cooperation opportunities.

- Students are still leaving China and India in large numbers to study overseas. This has led to an over-reliance on these markets amongst English-speaking Western countries. It is important to diversify and cultivate some emerging markets.

- Some countries, especially in Asia, are actively working to keep students studying at home. Japan is moving towards greater internationalisation.

- Emergence of the “global” student, who seeks better quality, cheaper education offerings closer to home, means that some of our traditional source countries (Malaysia, Singapore, Hong Kong) are becoming competitors.

Visa and policy settings

- Countries are constantly tweaking their visa settings to achieve a balance between encouraging international students and responding to public concerns about quality outcomes, especially links to migration and employment. Student response is almost immediate.

- Long term student visas have increased for each of the last three years, suggesting a possible competitive advantage through a changing student mix. Short term visas (less than 6 months) are decreasing.

Price sensitivity

- Some countries have experimented with “free” higher education, but in recent years there has been a move towards charging fees that are higher than domestic fees to build a reputation for quality. Evidence is that reinvestment in products and services, which are responsive to students’ needs, is crucial.

- Foundation courses can be used as loss-leaders to encourage enrolment into technical or higher education courses.

- Quality and cost effective accommodation options are important and some courses offer guaranteed or subsidised accommodation to international students.

- Private tertiary students are increasingly price sensitive. The rapid devaluation of the Indian rupee over the last few years hasn’t been felt yet, but may impact on numbers as students are making decisions and weighing up options.

School

- Global trend towards studying abroad younger, led by China. This presents an opportunity to build on our reputation for quality school education, both secondary and below.

- New Zealand has a relatively large international market share of schools' students, led by our strong pedagogy and consistent PISA scores. Some commentators suggest this share is as much as 13% of the global market.
- In-depth China research shows that the New Zealand's schools product is very well perceived by Chinese parents.

Delivery methods

- Online delivery methods are gaining in popularity. MOOCs are increasingly being seen as an opportunity to engage with a large potential student cohort to market future on-campus study options.
- Revenue streams from MOOCs are emerging and products often co-brand for certificates or credentials.
- Public, private partnerships in online delivery are emerging. The private partner may take the risk of set up in return for a greater share of returns in the longer term.

Opportunities to explore further

Student recruitment markets

Higher education:

- Build and diversify student mix from Indonesia, India and China, less business students more STEM
- Build a bigger share of the scholarship market (Kurdistan, Libya, Latin America) and the Erasmus Mundus scheme
- Keep a watch on emerging markets, Latin America (Peru, Chile, Colombia), the Middle East (UAE, Iran), and South East Asia (Thailand, Malaysia, Philippines)

Technical and vocational training:

- Build and diversify the students from emerging economies looking to improve their economic performance
- All of the polytechnics have the capacity to grow in international enrolments onshore substantially. Explore the Middle East and parts of South East Asia.

Private tertiary and English language:

- Potential in most ASEAN countries
- PTEs report operating at around 55% capacity suggesting that new products and niche markets can be identified.
- The sector is nimble and responsive so once opportunities are identified products can be quickly developed and brought to market.

Schools:

- Consolidate and rebuild include Japan and Korea
- Build markets in Latin America (Brazil and Chile) and China

Product development opportunities

Higher education:

- Develop a plan to internationalise campuses in New Zealand to around 20% of the total student population
- Move away from the "all things to all people" approach and develop greater levels of specialisation.
- Develop niche subject areas linked to internships, study pathways and product development and innovation, such as engineering, energy, film and technology
- Link internationally, both public and private, to deliver co-branded products
- Link international students more overtly with innovation and knowledge building through scholarships, internships and research opportunities.

PTE and English language:

- Tailored high end products linked to edu-tourism, short stay courses.
- Increasing focus on value not volume, once we are clear where those value pockets are.
- Offshore development of course delivery at lower qualification levels. There is an opportunity for domestic competitors to partner and work together internationally.

Schools:

- Independent and private schools with boarding options that particularly appeals to Asian families.
- Outdoor education products
- Soft skills (thinking and communication) products combined with English language
- Develop short stay products such as summer camps (linked to sport), and half semester options, especially for European and American students.

TVET:

- TVET skills development offshore especially in the corporate and government sectors in India, China and Indonesia. Build on projects are already in development with [REDACTED] OIA s9(2)(b)(ii)
- Develop a New Zealand TVET service model and "shop front" offshore that goes beyond polytechs to include ITOs and PTEs
- Develop nimble and responsive market-led product development e.g. graduate and post graduate diplomas, pathway options to niche products like the Bachelor of Engineering Technology, pathways to university study.
- International and private partnerships to deliver blended and pathway learning options.
- Offshore co-branded branch campuses, that remove the risks attached to bricks and mortar.
- Link products to jobs in New Zealand and internationally.

Education business opportunities:

- Build long lead time event linkages between school and university study. For example linking Japanese school exchanges with a rugby focus to study in sports management or coaching. Use these linkages to build brand and market share through to the Rugby World Cup 2019 and the Olympics 2020 in Japan.
- Government intellectual property packaged and marketed via private companies, especially in response to the need to develop home grown higher education systems in the Middle East, BRIC countries and countries such as Peru.
- Online product development linkages between private companies eg [REDACTED] etc) and platform developers such as Massey Online, Open Polytechnic.

Official Information Act Request

OIA Title:	OIA s9(2)(a) [REDACTED] – ENZ marketing budget in India and China and complaints against private training establishments and agents
Date:	9 May 2016
Minister's Office ID no.	
ENZ ID no:	1516-226

Purpose

1. To provide you with information to use in the processing of an Official Information Act 1982 (OIA) request.

Summary

2. On 18 April 2016, ENZ received the following OIA request from [REDACTED], a journalist at [REDACTED] OIA s9(2)(a)
 1. 'How much of each year's ENZ marketing budget from 2012 – 2015 was spent promoting NZ to Indian students?
 - a. In relation to the above question what is this year's (2016) Indian marketing budget?
 - b. In relation to the above questions, how much of each year's budget from 2010 – 2015 was spent promoting NZ to Chinese students and what is this year's budget?
 2. In 2013, how much was spent sending former Black Cap Chris Cairns to Bangalore as part of the education fair?
 3. From 2012 to date, how many complaints has Education NZ received in relation to PTEs (only those who can enrol international students) from students (current or former), staff (current or former) and agents?
 - a. Please supply any correspondence (including but not exclusive to emails, meeting notes and letters) in relation to these complaints.
 4. From 2012 to date, how many complaints has Education NZ received in relation to agents/educational consultants in India or those who work with Indian students in NZ?
 - a. Please supply any correspondence (including but not exclusive to emails, meeting notes and letters) regarding these complaints.'
3. On 2 May 2016 [REDACTED] OIA s9(2)(a) advised that the scope of question three above should be limited to complaints concerning the Indian market only.
4. ENZ has drafted a response that:
 - specifies ENZ's marketing budget for India and China
 - confirms ENZ has not paid for sending Chris Cairns to Bangalore
 - includes information concerning two complaints against agents.

5. In regard to question four the following documents are proposed to be released to [REDACTED]. Unredacted copies of both documents are attached in Appendix Two.

Document	Reason for withholding information under the Official Information Act
[REDACTED] - Redacted	Section 9(2)(a) protecting the privacy of natural persons
[REDACTED] - Redacted	Section 9(2)(a) protecting the privacy of natural persons

OIA s9(2)(a)

OIA s9(2)(a)

Background OIA s9(2)(a)

6. [REDACTED].co.nz) is a digital news platform covering news stories across the tags of news, society, culture, life, comment, and video. It is primarily aimed at an audience in the 20-30 year old age bracket. The website also and invites contributions from readers on issues not usually discussed in mainstream media.

Comment and risk assessment

7. ENZ has assessed the risk of this OIA release as medium:

- OIA s9(2)(a)
- There is the possibility that [REDACTED] may generate publicity around negative experiences Indian students have encountered with PTEs and education agents. She also might question the rationale behind ENZ's marketing initiatives in India and China.
 - On Tuesday, 3 May 2016 there was a piece on TV3's 6 o'clock news about allegations of fraudulent Indian student visa applications from unlicensed agents. There was a follow up story on the 6 o'clock news on 4 May, including an interview with Immigration New Zealand (INZ) Acting General Manager, Geoff Scott, and a statement from ENZ. We have been working closely with INZ to ensure consistent messaging around this issue. There is likely to be further media interest in the story in the short to medium term. OIA s9(2)(a)
 - INZ also received a similar request for information from [REDACTED] on 18 April. This was:
 1. *From 2012 to date, how many complaints has Immigration NZ received in relation to agents/educational consultants in India (or those who work with Indian students in NZ)?*
 - a. *Please supply any correspondence (including but not exclusive to emails, meeting notes and letters) in relation to these complaints.*
 2. *What advice has Immigration NZ given to NZQA and the Minister of Tertiary Education about English language rules and other requirements for Indian international students since 2013?*
 3. *"In September, INZ Mumbai experienced the expected surge in submitted applications in the lead up to the NZQA Rule 18 change. Originally intended to occur on 1 October, the deadline was extended to 24 October, and we then experienced an unplanned increase in applications on an unprecedented scale." In relation to the above excerpt from the India Student Market newsletter in November 2015, why was the Rule 18 change deadline extended?*

Recommendations

We recommend that you

- a. Note ENZ's draft response to the requestor

Grant McPherson
Chief Executive
Education New Zealand

Hon Steven Joyce
Minister for Tertiary Education, Skills and Employment

____/____/____

Released under the Official Information Act 1982

Appendix One – Proposed response to the requestor

Released under the Official Information Act 1982

Appendix Two – Unredacted documents

Released under the Official Information Act 1982

17 May 2016

OIA s9(2)(a)

[Redacted] .co.nz

Dear [Redacted]

Thank you for your request dated 18 April 2016 concerning Education New Zealand's (ENZ) marketing budget for India and China and complaints against private training institutions (PTEs) and education agents. Your request has been considered under the Official Information Act 1982. Your request stated:

1. *How much of each year's ENZ marketing budget from 2012 – 2015 was spent promoting NZ to Indian students?*
 - a) *In relation to the above question what is this year's (2016) Indian marketing budget?*
 - b) *In relation to the above questions, how much of each year's budget from 2010 – 2015 was spent promoting NZ to Chinese students and what is this year's budget?*
2. *In 2013, how much was spent spending former Black Cap Chris Cairns to Bangalore as part of the education fair?*
3. *From 2012 to date, how many complaints has Education NZ received in relation to PTEs (only those who can enrol international students) from students (current or former), staff (current or former) and agents?*
 - a) *Please supply any correspondence (including but not exclusive to emails, meeting notes and letters) in relation to these complaints.*
4. *From 2012 to date, how many complaints has Education NZ received in relation to agents/educational consultants in India or those who work with Indian students in NZ?*
 - a) *Please supply any correspondence (including but not exclusive to emails, meeting notes and letters) regarding these complaints.*

In regard to question one, ENZ's marketing budget for China and India is as follows:

	Year Ending June 2016 (forecast)	Year Ending June 2015 (actual)	Year Ending June 2014 (actual)	Year Ending June 2013 (actual)	Year Ending June 2012 (actual)
China	\$1,290,046	\$939,891	\$1,704,082	\$596,834	\$147,491
India	\$726,096	\$470,096	\$896,435	\$510,319	\$67,391

Please note that these figures include marketing activities led by ENZ marketing and communications teams, where the costs are directly attributable to China and India. Specifically, these are education events and fairs, digital marketing and public relations. ENZ was established on 1 September 2011, so the information for the year ending June 2012 covers ten months.

In regard to question two, ENZ did not pay for the services of Chris Cairns at the Bangalore education fair.

OIA s9(2)(a)

██████████ sent you an email dated 21 April 2016 in regard to the scope of question three, to which you responded to him on 2 May 2016 that this could be '...limited to complaints concerning the Indian market only'. On this basis, ENZ did not receive complaints in relation to PTEs (only those who can enrol international students) from students (current or former), staff (current or former) and agents.

In regard to question four, ENZ received information concerning complaints against ██████████ ██████████. This information is attached.

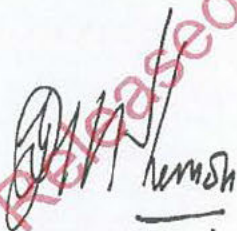
OIA s9(2)(a)

Some information has been withheld from the documents provided to you in regard to question four. Information has been withheld under section 9(2)(a) of the Act to protect the privacy of natural persons.

Under sections 19 and 28(3) of the Official Information Act 1982 you have the right to ask an Ombudsman to review this decision, whose address for contact purposes is:

The Ombudsman
Office of the Ombudsman
P O Box 10-152
WELLINGTON

Yours sincerely



Grant McPherson
Chief Executive
Education New Zealand

From: [REDACTED]
Sent: Tuesday, 29 September 2015 8:37 a.m.
To: Agent Help <agenthelp@enz.govt.nz>
Subject: RE: Fake agent

I've got a plan, talk later.

From: Agent Help
Sent: Tuesday, 29 September 2015 8:36 a.m.
To: [REDACTED] Agent Help <agenthelp@enz.govt.nz>; [REDACTED]
Cc: [REDACTED]
Subject: RE: Fake agent

Thank you [REDACTED] that is very helpful.

Warm regards,

[REDACTED]

From: [REDACTED]
Sent: Monday, 28 September 2015 4:21 p.m.
To: Agent Help <agenthelp@enz.govt.nz>; [REDACTED]
Cc: [REDACTED]
Subject: RE: Fake agent

Hi [REDACTED]

We haven't really heard of this agent, however I tried to find out from INZ re the applications if any they had processed for NZ. The response is a bit odd, please see attached. Therefore pretty much nothing for India really! Hope this helps.

Regards,

[REDACTED]

[REDACTED]

From: Agent Help
Sent: Monday, 28 September 2015 6:43 a.m.
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: Fake agent

Hi [REDACTED]

If you could please let me know if you've got any information on the below agent

Thank you, greatly appreciated

Regards,
[REDACTED]

From: [REDACTED]
Sent: Thursday, 24 September 2015 3:26 p.m.
To: Clive Jones <Clive.Jones@enz.govt.nz>; Agent Help <agenthelp@enz.govt.nz>; Peter Bull <Peter.Bull@enz.govt.nz>
Cc: [REDACTED]
Subject: RE: Fake agent

Hi there

I've not heard of this agent. [REDACTED] will check and confirm status.

From: Clive Jones
Sent: Thursday, 24 September 2015 2:13 a.m.
To: Agent Help; [REDACTED] Peter Bull
Cc: [REDACTED]
Subject: RE: Fake agent

Hi [REDACTED]

We have a standard 'cease and desist' letter that we can send if it turns out they are claiming to be ENZRA but not actually approved. Will wait until we have clarity over their status.

From: Agent Help

Sent: Thursday, 24 September 2015 8:31 AM

To: [REDACTED] Clive Jones <Clive.Jones@enz.govt.nz>; Peter Bull <Peter.Bull@enz.govt.nz>

Subject: FW: Fake agent

Hi team,

I've received a complaint from the below student stating that an agent [REDACTED] had approached him claiming he was an ENZ recognised agent. He uses our certificate, our logo on his business card, and has ENZRA embedded in all his marketing collateral (attached). After some research, I found that he has completed the course; but can't seem to find his recommendation anywhere; nor is he published on our website.

Unless this was simply a mistake from our end for not publishing him on our website, I'm concerned he may have not been recommended. [REDACTED] you may know this agent?

Any help would be appreciated.

Regards

[REDACTED]

From: [REDACTED]

Sent: Wednesday, 23 September 2015 10:46 p.m.

To: Agent Help <agenthelp@enz.govt.nz>

Subject: Re: Fake agent

-----Original Message-----

From: [REDACTED]
Sent: Tuesday, 6 October 2015 2:59 a.m.
To: Agent Help <agenthelp@enz.govt.nz>
Subject: Re: Fake agent

What should I do?

Sent from my iPhone

> On 28-Sep-2015, at 1:34 AM, Agent Help <agenthelp@enz.govt.nz> wrote:

>

> Hi [REDACTED]

>

> We are currently looking into this; however cannot share the information of this matter. Please be assured that the appropriate steps will be taken to make sure this is an approved and recommended agent.

>

> Warm regards,

> [REDACTED]

>

> -----Original Message-----

> From: [REDACTED]
> Sent: Saturday, 26 September 2015 9:40 a.m.
> To: Agent Help <agenthelp@enz.govt.nz>
> Subject: Re: Fake agent

>

> Had you taken any steps or they are enzfa agent??

>

>

> Sent from my iPhone

>

>> On 23-Sep-2015, at 2:48 am, Agent Help <agenthelp@enz.govt.nz> wrote:

>>

>> Hi [REDACTED]

>>

>> To make a formal complaint, we will need to let the agent know who the complaint is coming from. However, if the agent is using our logo without being an ENZ recognised agent, then we will not mention your name, however will need evidence of that occurring.

>>

>> Kind regards,

>> [REDACTED]

>>

>> -----Original Message-----

>> From: [REDACTED]
>> Sent: Wednesday, 23 September 2015 12:43 a.m.
>> To: Agent Help <agenthelp@enz.govt.nz>
>> Subject: Re: Fake agent

>>

>> First can you make sure that my name will not be included

>>

>> Sent from my iPhone

>>

>>> On 22-Sep-2015, at 2:36 am, Agent Help <agenthelp@enz.govt.nz> wrote:

>>>

>>> Hi [REDACTED]

>>>

>>> Could you kindly provide me proof in where he states he is an ENZ recognised agent?

>>>

>>> Thank you and warm regards,

>>> [REDACTED]

>>>

>>> -----Original Message-----

>>> From: [REDACTED]

>>> Sent: Monday, 21 September 2015 6:33 p.m.

>>> To: Agent Help <agenthelp@enz.govt.nz>

>>> Subject: Re: Fake agent

>>>

>>> [REDACTED]

>>>

>>> Sent from my iPhone

>>>

>>>> On 21-Sep-2015, at 1:39 am, Agent Help <agenthelp@enz.govt.nz> wrote:

>>>>

>>>> Hi [REDACTED]

>>>>

>>>> Thank you for getting in touch with us.

>>>> Could you kindly send me the agents name?

>>>>

>>>> Thank you in advance

>>>>

>>>> Regards

>>>> [REDACTED]

>>>>

>>>> -----Original Message-----

>>>> From: [REDACTED]

>>>> Sent: Sunday, 20 September 2015 3:00 a.m.

>>>> To: Agent Help <agenthelp@enz.govt.nz>

>>>> Subject: Fake agent

>>>>

>>>> Hello there is one fake agent who is saying that he is nz recognised agent but his company name is not shown in your list what can I do?

>>>>

>>>> WARNING

>>>>

>>>> The information contained in this email message is intended for the addressee only and may contain privileged information. If you are not the intended recipient of this message or have received this message in error, you must not peruse, use, distribute or copy this message or any of its contents.

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>>>> Also note, the views expressed in this message may not necessarily reflect those of the Education New Zealand. If you have received this message in error, please email or telephone the sender immediately.

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>

> Also note, the views expressed in this message may not necessarily reflect those of the Education New Zealand. If you have received this message in error, please email or telephone the sender immediately.

RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982

Clive Jones

From: Agent Help
Sent: Thursday, 17 September 2015 8:10 AM
To: John Goulter; Clive Jones; Peter Bull; Hannah Lee-Darboe
Subject: FW: Form submission from: Send us a message

Hi team,

We have the below complaint in regards to Indian ENZRA agent: [REDACTED]

OIA s9(2)(a)

Please let me know what steps we should be taking against these sorts of complaints.

Regards,
[REDACTED]

-----Original Message-----

From: educationnz
Sent: Saturday, 12 September 2015 12:40 a.m.
To: educationnz <educationnz@enz.govt.nz>
Subject: Form submission from: Send us a message

Submitted on Saturday, September 12, 2015 - 00:39 Submitted by anonymous user: [202.12.103.65] Submitted values are:

[REDACTED]
Subject: Website enquiry: India

Message:

Hello sir,

I didnt know where to complain of an agent who claims to have received a certificate from you. The agent name is [REDACTED] he keeps the original documents of all the students who want to apply to new Zealand and also threatens them. He asks for money incase a student requests for the documents back. We have mail proofs where he claims to be in possession of the documents. As per our knowledge this is illegal as per the Indian law and such people should not be allowed to fool and extort students. Request you to please help and request you to not disclose my identity as he has threatened me of dire consequences.

The results of this submission may be viewed at:

<http://enz.govt.nz/node/121/submission/1019>

Clive Jones

From: [REDACTED]
Sent: Friday, 18 September 2015 5:18 PM
To: Peter Bull; [REDACTED]
Cc: [REDACTED] Clive Jones
Subject: RE: Form submission from: Send us a message

Oh God! This is scary.

This is the problem with the certification model (at least for India), I am not sure if there is procedure to cancel the certificate and even if there is how does it get implemented on ground. We could go back to the agent and convey our concerns around the complaints we have been receiving. We will also give a heads up to INZ re this agent, which is what will bother him the most.

[REDACTED] This is not an ENZ Recognised agent, he has undertaken the e-learning and hence is a certified agent (basically just printed the certificate which appears at the end of the training module!). ENZ offshore does not engage much with them. Appreciate if you could convey the same to the student and perhaps loop me in. We definitely don't want to get involved in the legal zone that should remain between the student and the agent.

Hope this helps.

Regards,
[REDACTED]
[REDACTED]

-----Original Message-----

From: Peter Bull
Sent: Friday, 18 September 2015 1:53 a.m.
To: [REDACTED]
Cc: [REDACTED] Clive Jones
Subject: FW: Form submission from: Send us a message

FYI

-----Original Message-----

From: Agent Help
Sent: Thursday, 17 September 2015 8:10 a.m.
To: John Goulter <John.Goulter@enz.govt.nz>; Clive Jones <Clive.Jones@enz.govt.nz>; Peter Bull <Peter.Bull@enz.govt.nz>; Hannah Lee-Darboe <Hannah.Lee-Darboe@enz.govt.nz>
Subject: FW: Form submission from: Send us a message

Hi team,

We have the below complaint in regards to Indian ENZRA agent: [REDACTED]

Please let me know what steps we should be taking against these sorts of complaints.

Regards,
[REDACTED]

-----Original Message-----

From: educationnz
Sent: Saturday, 12 September 2015 12:40 a.m.
To: educationnz <educationnz@enz.govt.nz>
Subject: Form submission from: Send us a message

Submitted on Saturday, September 12, 2015 - 00:39 Submitted by anonymous user: [202.12.103.65] Submitted values are:

Full Name: [REDACTED]
Email: [REDACTED]
Subject: Website enquiry: India
Message:
Hello sir,

I didnt know where to complain of an agent who claims to have received a certificate from you. The agent name is [REDACTED] he keeps the original documents of all the students who want to apply to new Zealand and also threatens them. He asks for money incase a student requests for the documents back. We have mail proofs where he claims to be in possession of the documents. As per our knowledge this is illegal as per the Indian law and such people should not be allowed to fool and extort students. Request you to please help and request you to not disclose my identity as he has threatened me of dire consequences.

The results of this submission may be viewed at:
<http://enz.govt.nz/node/121/submission/1019>

RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982

Clive Jones

From: [REDACTED]
Sent: Friday, 18 September 2015 5:22 PM
To: [REDACTED]
Cc: Peter Bull; [REDACTED] Clive Jones
Subject: Re: Form submission from: Send us a message

Hi [REDACTED]

We don't actually know if this is a student or another agent complaining - without evidence or proof we can not take any action as Clive has advised. If there was a complaint against an agent we would need to tell them where/who that complaint is coming from; however this person requested to remain anonymous.

It's a heads up for ENZ at the moment, and we will keep an eye out on this agent if any other complaints arise.

Thanks for your concern,

Warm regards

[REDACTED]
Education New Zealand
[REDACTED]

> On 18/09/2015, at 5:17 pm, [REDACTED] wrote:

>

> Oh God! This is scary.

>

> This is the problem with the certification model (at least for India), I am not sure if there is procedure to cancel the certificate and even if there is how does it get implemented on ground. We could go back to the agent and convey our concerns around the complaints we have been receiving. We will also give a heads up to INZ re this agent, which is what will bother him the most.

>

> [REDACTED] This is not an ENZ Recognised agent, he has undertaken the e-learning and hence is a certified agent (basically just printed the certificate which appears at the end of the training module!). ENZ offshore does not engage much with them. Appreciate if you could convey the same to the student and perhaps loop me in. We definitely don't want to get involved in the legal zone that should remain between the student and the agent.

>

> Hope this helps.

>

> Regards,

> [REDACTED]

>

> [REDACTED]

>

>

> -----Original Message-----

> From: Peter Bull

> Sent: Friday, 18 September 2015 1:53 a.m.

> To: [REDACTED]

> Cc: [REDACTED] Clive Jones

> Subject: FW: Form submission from: Send us a message

>

> FYI

>

> -----Original Message-----

> From: Agent Help

> Sent: Thursday, 17 September 2015 8:10 a.m.

> To: John Goulter <John.Goulter@enz.govt.nz>; Clive Jones <Clive.Jones@enz.govt.nz>; Peter Bull <Peter.Bull@enz.govt.nz>; Hannah Lee-Darboe <Hannah.Lee-Darboe@enz.govt.nz>

> Subject: FW: Form submission from: Send us a message

>

> Hi team,

>

> We have the below complaint in regards to Indian ENZRA agent: [REDACTED]

>

> Please let me know what steps we should be taking against these sorts of complaints.

>

> Regards,

> [REDACTED]

>

> -----Original Message-----

> From: educationnz

> Sent: Saturday, 12 September 2015 12:40 a.m.

> To: educationnz <educationnz@enz.govt.nz>

> Subject: Form submission from: Send us a message

>

> Submitted on Saturday, September 12, 2015 - 00:39 Submitted by anonymous user: [202.12.103.65] Submitted values are:

>

> Full Name: [REDACTED]

> Email: [REDACTED]

> Subject: Website enquiry: India

> Message:

> Hello sir,

>

> I didnt know where to complain of an agent who claims to have received a certificate from you. The agent name is [REDACTED] he keeps the original documents of all the students who want to apply to new Zealand and also threatens them. He asks for money incase a student requests for the documents back. We have mail proofs where he claims to be in possession of the documents. As per our knowledge this is illegal as per the Indian law and such people should not be allowed to fool and extort students. Request you to please help and request you to not disclose my identity as he has threatened me of dire consequences.

>

>

>

> The results of this submission may be viewed at:

> <http://enz.govt.nz/node/121/submission/1019>

>

Clive Jones

From: [REDACTED]
Sent: Friday, 18 September 2015 5:27 PM
To: [REDACTED]
Cc: Peter Bull; [REDACTED] Clive Jones
Subject: RE: Form submission from: Send us a message

OK.

But worth keeping in mind when the new agent programme is devised, especially around the 'Certified Agents'

Regards,

[REDACTED]

[REDACTED]

-----Original Message-----

From: [REDACTED]
Sent: Friday, 18 September 2015 10:52 a.m.
To: [REDACTED]
Cc: Peter Bull; [REDACTED] Clive Jones
Subject: Re: Form submission from: Send us a message

Hi [REDACTED]

We don't actually know if this is a student or another agent complaining - without evidence or proof we can not take any action as Clive has advised. If there was a complaint against an agent we would need to tell them where/who that complaint is coming from; however this person requested to remain anonymous.

It's a heads up for ENZ at the moment, and we will keep an eye out on this agent if any other complaints arise.

Thanks for your concern,

Warm regards

[REDACTED]

Education New Zealand

[REDACTED]

> On 18/09/2015, at 5:17 pm, [REDACTED] wrote:

>

> Oh God! This is scary.

>

> This is the problem with the certification model (at least for India), I am not sure if there is procedure to cancel the certificate and even if there is how does it get implemented on ground. We could go back to the agent and convey our concerns around the complaints we have been receiving. We will also give a heads up to INZ re this agent, which is what will bother him the most.

>

> [REDACTED] This is not an ENZ Recognised agent, he has undertaken the e-learning and hence is a certified agent (basically just printed the certificate which appears at the end of the training module!). ENZ offshore does not

engage much with them. Appreciate if you could convey the same to the student and perhaps loop me in. We definitely don't want to get involved in the legal zone that should remain between the student and the agent.

>
> Hope this helps.

> Regards,

> [REDACTED]

> [REDACTED]

> -----Original Message-----

> From: Peter Bull
> Sent: Friday, 18 September 2015 1:53 a.m.
> To: [REDACTED]
> Cc: [REDACTED] Clive Jones
> Subject: FW: Form submission from: Send us a message

> FYI

> -----Original Message-----

> From: Agent Help
> Sent: Thursday, 17 September 2015 8:10 a.m.
> To: John Goulter <John.Goulter@enz.govt.nz>; Clive Jones <Clive.Jones@enz.govt.nz>; Peter Bull <Peter.Bull@enz.govt.nz>; Hannah Lee-Darboe <Hannah.Lee-Darboe@enz.govt.nz>
> Subject: FW: Form submission from: Send us a message

> Hi team,

> We have the below complaint in regards to Indian ENZRA agent: [REDACTED]

> Please let me know what steps we should be taking against these sorts of complaints.

> Regards,

> [REDACTED]

> -----Original Message-----

> From: educationnz
> Sent: Saturday, 12 September 2015 12:40 a.m.
> To: educationnz <educationnz@enz.govt.nz>
> Subject: Form submission from: Send us a message

> Submitted on Saturday, September 12, 2015 - 00:39 Submitted by anonymous user: [202.12.103.65] Submitted values are:

> Full Name: [REDACTED]
> Email: [REDACTED]
> Subject: Website enquiry: India

> Message:

> Hello sir,

> I didnt know where to complain of an agent who claims to have received a certificate from you. The agent name is [REDACTED] he keeps the original documents of all the students who want to apply to new Zealand and also threatens them. He asks for money incase a student requests for the documents back. We have mail proofs where he claims to be in possession of the documents. As per our knowledge this is

illegal as per the Indian law and such people should not be allowed to fool and extort students. Request you to please help and request you to not disclose my identity as he has threatened me of dire consequences.

>

>

>

> The results of this submission may be viewed at:

> <http://enz.govt.nz/node/121/submission/1019>

>

RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982

Education New Zealand Briefing

Title:	Indian student visa numbers to 30 June 2016
Date:	20 July 2016
Priority:	High
Security level:	Unclassified
ENZ ID no:	1617-026

Action sought

Addressee:	Action sought:	Deadline:
Minister for Tertiary Education, Skills and Employment	Note that the total number of student visas and first-time student visas approved for Indian students to 30 June 2016 is lower than the same period in 2015	
Enclosure:	No	Round robin: No

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact:
John Goulter	Acting Chief Executive	[REDACTED]	[REDACTED]	X
Angela Meredith	Accountability Manager	[REDACTED]	[REDACTED]	OIA s9(2)(a)

The following departments/agencies have seen this report

<input type="checkbox"/> ERO	<input type="checkbox"/> MBIE	<input type="checkbox"/> MFaT	<input type="checkbox"/> MoH	<input type="checkbox"/> MoE	<input type="checkbox"/> MSD
<input type="checkbox"/> NZQA	<input type="checkbox"/> NZTE	<input type="checkbox"/> TEC	<input type="checkbox"/> TPK	<input type="checkbox"/> Treasury	<input type="checkbox"/>

Minister's office to complete

<input type="checkbox"/> Approved	<input type="checkbox"/> Declined	<input type="checkbox"/> Noted	<input type="checkbox"/> Needs change
<input type="checkbox"/> Seen	<input type="checkbox"/> Overtaken by events	<input type="checkbox"/> See Minister's notes	<input type="checkbox"/> Withdrawn

Comments:

Education New Zealand Briefing

Title:	Indian student visa numbers to 30 June 2016
Date:	20 July 2016
ENZ ID no:	1617-026

Recommendations

We recommend that you

- note that the total number of student visas and first-time student visas approved for Indian students to 30 June 2016 is lower than the same period in 2015

NOTED



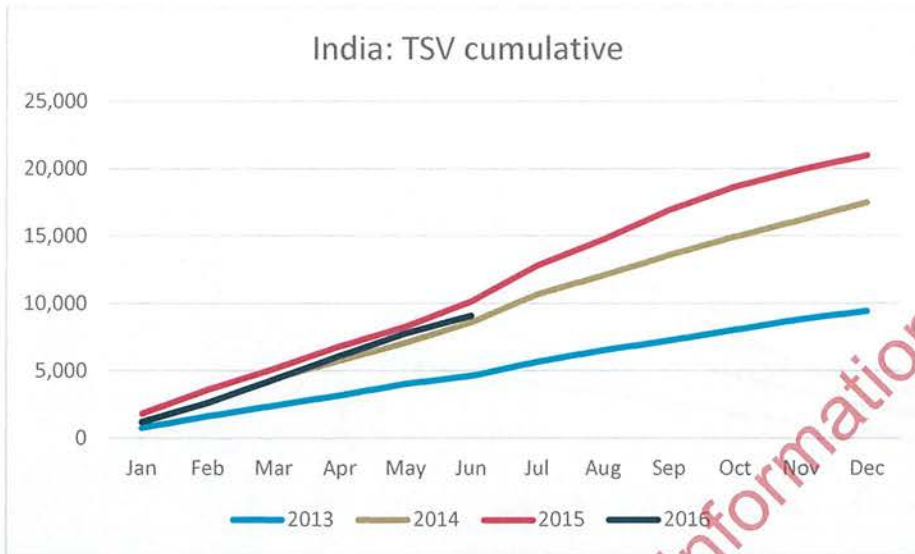
John Goulter
Acting Chief Executive
Education New Zealand

Hon Steven Joyce
Minister for Tertiary Education, Skills and Employment

____/____/____

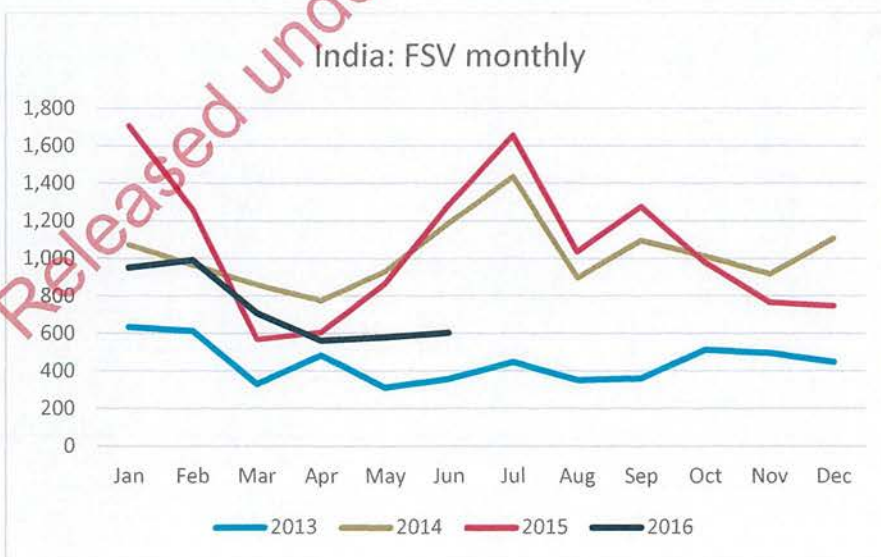
Released under the Official Information Act 1982

2015	1,899	3,656	5,201	6,864	8,334	10,223	12,894	14,807	16,984	18,722	19,985	21,034
2016	1,229	2,664	4,373	6,116	7,806	9,136						



6. The number of First-time Student Visas (FSV) approved for Indian students to 30 June 2016 are 30% below the FSVs approved for the same period in 2015.

FSV monthly	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2013	636	617	332	487	313	360	451	354	364	514	499	450
2014	1,074	967	859	776	931	1,188	1,436	898	1,096	1,012	918	1,107
2015	1,709	1,264	571	609	867	1,288	1,659	1,038	1,278	981	768	750
2016	953	994	710	565	582	605						



FSV cumulative	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2013	636	1,253	1,585	2,072	2,385	2,745	3,196	3,550	3,914	4,428	4,927	5,377



Business Growth Agenda

Building Export Markets Project Progress

Project title	Recent trends in international education growth
Responsible agency	ENZ

This paper provides an update on the recent trends in the growth of the international education industry.

Value of the international education industry

International education is New Zealand's fifth largest export industry and the second largest service export, after tourism. Statistics New Zealand valued 'education travel services' at \$3.1 billion for 2015. This valuation measures the value of attracting international students to New Zealand and does not include the value of education products and services delivered offshore. ENZ estimates the economic value from the delivery of education products and services offshore at an additional \$242 million in 2015 taking the total value for international education to \$3.3 billion for 2015. The industry is making good progress in achieving the valuation target of \$5 billion per year by 2025 as set out in the Leadership Statement for International Education.

Student visas to 31 July 2016

In 2014 and 2015 the international education industry saw significant year on year growth in the number of international student enrolments. This followed a period of decreasing student enrolments following the 2011 Canterbury earthquakes and the global financial crisis.

For the 2016 year to date total student visas (TSV) are down 5% and first time student (FSV) are down 12%. This is driven almost exclusively by the Indian market. ENZ expects this YTD trend to continue for the rest of 2016.

Released under the Official Information Act 1982

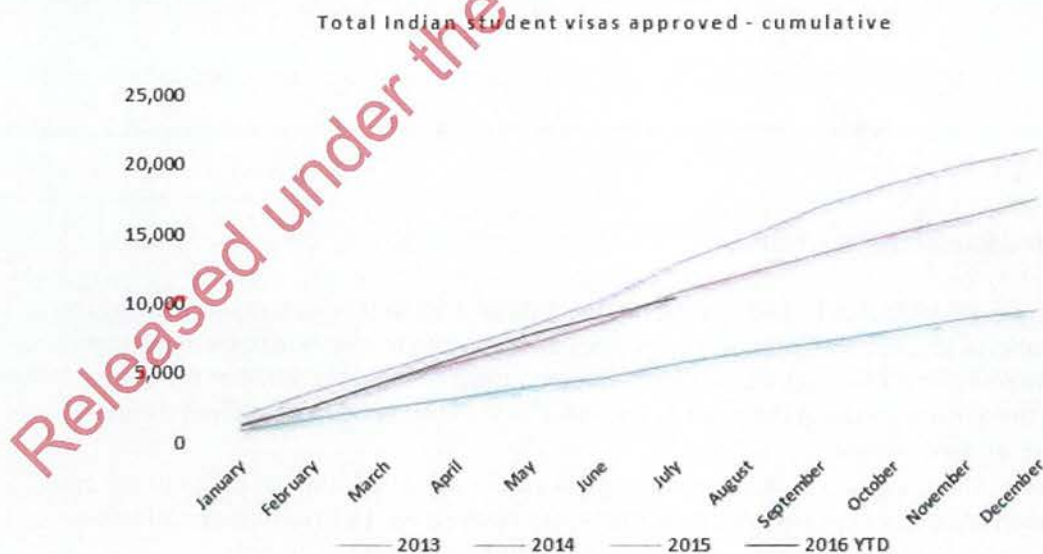
more Indian nationals applied to study in New Zealand than any other nationality; the overall volume of Indian students applying to New Zealand exceeded China for the first time.

However, a significant percentage of Indian visa applications have been declined this year - visa approvals¹ for July 2016 are 52%, down from 71% in July 2015. The number of visa declines reflects low English language competency, immigration fraud issues and poor agent behaviour which are being addressed by Immigration New Zealand (INZ) and the New Zealand Qualifications Authority (NZQA).

The growth has been driven by enrolments at private training establishments (PTEs) which grew 167% between 2013 and 2015. While all qualifications on the National Qualifications Framework and the providers delivering those qualifications are quality assured, there are a small number of PTEs recruiting low value students from the Indian market into lower value programmes. In the year to July 2016, almost 40% of total Indian student visas were for PTE Level 5-6 enrolments.

ENZ's marketing approach to India to focusing on moving to high value, higher level qualifications with a geographical focus on major cities and states in Southern India which traditionally have a lower immigration risk.

New Zealand government agencies including ENZ, INZ, the Ministry of Business, Innovation and Employment, NZQA and Tertiary Education Commission are working more actively to address these issues. This includes actions to better align regulatory functions and increase provider responsibility for recruiting genuine students who have the best chance of success in New Zealand, supported by stronger communications to set expectations around market quality, and marketing strategies to target high value students from India into higher value programmes. As a result of these actions student visas for India decreased by 19% for the July YTD compared with 2015 as New Zealand moves to reposition itself in the market. FSV from India are down 38% for the July YTD compared with 2015.



¹ ENZ excludes dependants, applicants under Section 61, and Variation of Conditions in calculating the student visa approval rate.

- **Project based:** These are markets where we will focus on a targeted project. In 2017 these markets will be Chile ('Penguins without Borders' scholarship programme), Malaysia (foundation studies) and Saudi Arabia (maintaining political/ministry relationships).

Activities in those markets are driven by ENZ's focus on 'value + volume +growth'. The activities may include but are not limited to ENZ-organised and commercial education fairs, digital marketing, education agent seminars, media and education agent familiarisation visits to New Zealand, social media and public relations.

Released under the Official Information Act 1982

Education New Zealand Briefing

Title:	India Student Market Update
Date:	18 August 2016
Priority:	Medium
Security level:	In Confidence
ENZ ID no:	1617-039

Action sought

Addressees:	Action sought:	Deadline:
Minister for Tertiary Education, Skills and Employment	Agree to change the frequency of India Joint Action Group reporting to ministers from fortnightly to monthly.	
Minister of Immigration	Forward this report to the Minister of Foreign Affairs and Minister of Trade.	
Enclosure:	Yes	Round robin: No

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact:
Matt Penney	Chief Financial Officer	[REDACTED]	[REDACTED]	OIA s9(2)(a)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	x OIA s9(2)(a)

The following departments/agencies have seen this report

<input type="checkbox"/> ERO	<input checked="" type="checkbox"/> MBIE	<input checked="" type="checkbox"/> MFaT	<input type="checkbox"/> MoH	<input checked="" type="checkbox"/> MoE	<input type="checkbox"/> MSD
<input checked="" type="checkbox"/> NZQA	<input type="checkbox"/> NZTE	<input checked="" type="checkbox"/> TEC	<input type="checkbox"/> TPK	<input type="checkbox"/> Treasury	<input type="checkbox"/>

Minister's office to complete

<input type="checkbox"/> Approved	<input type="checkbox"/> Declined	<input type="checkbox"/> Noted	<input type="checkbox"/> Needs change
<input type="checkbox"/> Seen	<input type="checkbox"/> Overtaken by events	<input type="checkbox"/> See Minister's notes	<input type="checkbox"/> Withdrawn

Comments:

[REDACTED]

Purpose

1. This report provides an update on the Indian student attraction market.

Background

1. The India Joint Action Group (IJAG) is responsible for reporting on actions to address issues in the India student market. IJAG provides regular updates to the Minister for Tertiary Education, Skills and Employment, and the Minister of Immigration, on agencies progress towards creating a sustainable India market for New Zealand's international education industry.
2. You previously agreed to forward IJAG reports to the Minister of Foreign Affairs and the Minister of Trade because of the potential bilateral and trade implications from the current India market issues.

Market update

Student visas

3. The visa approval¹ rate for July 2016 was 52 percent, down from 71 percent in July 2015. This is largely the result of Rule 18 English language changes and increased scrutiny of visa applications by Immigration New Zealand (INZ) to address fraud in the market. The rule change brought in to effect different programme entry requirements for international students from countries with a student visa approval rate below 80 percent.
4. In the year to July 2016, almost 40 percent of total Indian student visas issued were for students enrolling in level 5-6 qualifications at private training establishments (PTEs). PTEs have been driving growth [REDACTED] OIA s6(a)
5. Education New Zealand (ENZ) is working with the university and institutes of technology (ITPs) sectors to re-position New Zealand in the India market to attract higher value, genuine students into higher level programmes. Several meetings on India have been held this month with these sectors to advance discussions on student attraction in India.
6. Appendix One contains the India reporting dashboard. This provides:
 - total visa applications volumes and decisions by month
 - student visa applications by New Zealand sector and qualification level
 - student flows by states in India – visa approval rates and volumes by year
 - India monthly First Time Student Visas 2013-2016, with projected forecasts to December 2016
 - New Zealand Qualifications Authority (NZQA)/INZ activity in relation to the Education (Pastoral Care for International Students) Code of Practice 2016 (the Code).
7. 'India Student Market at a Glance July 2016' in Appendix Two provides a high-level overview, and focal point for IJAG, of issues and solutions for the India market.

¹ Education New Zealand excludes dependants, applicants under Section 61, and Variation of Conditions in calculating the student visa approval rate.

- INZ and NZQA newsletters to the New Zealand education industry providing India market updates and outlining expectations around market quality and behaviours and responsibilities under the new code of pastoral care
- publishing education agent performance data on INZ's website
- all-agency key messages on India including specific messages for Tertiary Education Commission (TEC) investment managers for their provider engagement
- attendance of the India High Commissioner to New Zealand at the NZIEC 2016 dinner in Auckland (the High Commissioner will be seated at Minister Joyce's table)
- messaging for the August visit to India by the Ministry of Foreign Affairs and Trade (MFAT) Deputy Secretary as a pre-cursor to Prime Minister Key's visit in October.

16. Agencies are continuing to support joint messaging to the industry. This includes preparation of a communication to chief executives and vice chancellors of providers engaged in the India market, outlining expectations and where relevant, individual provider market updates such as visa application approval rates.

Cross-agency sharing of data and information

17. IJAG has identified cross-agency sharing of international education data and information, particularly more sensitive information, as critical to making good decisions to support sustainable growth from the Indian market. Agencies share information on individual cases but a broader and systematised collection and analysis of data will strengthen agency responses to current and future issues and trends across all of New Zealand's international education markets.

18. IJAG is working with senior officials to progress stronger information sharing protocols between agencies through the International Education Senior Officials Group (IESOG).

Frequency of IJAG reporting

19. IJAG reports to Ministers on a fortnightly basis. The decision to do this was made during a period where agencies agreed to work more proactively on the India market and intense public interest in regard to Indian students. While agencies continue to strengthen their responses to developing sustainable growth from India, IJAG has reviewed this and now recommends changing to monthly reporting. This will provide a more valuable timeframe to decide and implement changes and to gather sufficient information to analyse impact on the market. Monthly reporting would also be in-line with current student visa reporting.

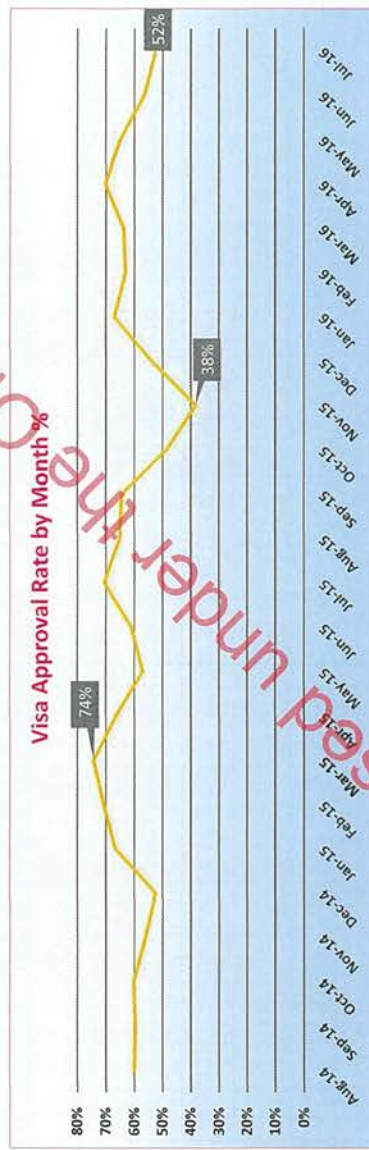
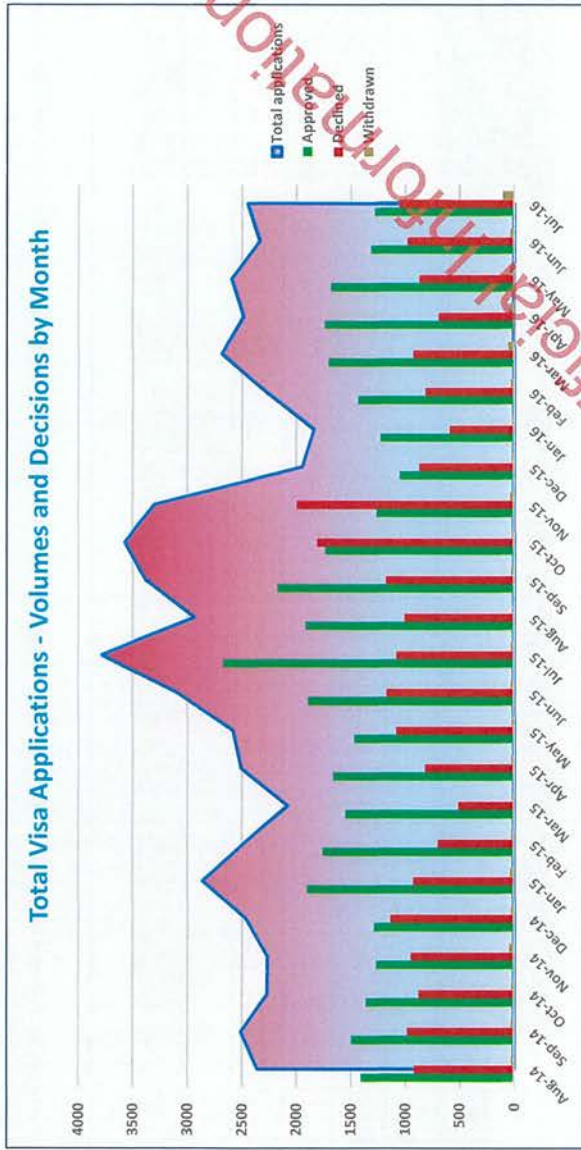
20. There are also more regular reporting mechanisms already in place that support agencies' work in this area including INZ and NZQA updates on their specific actions. The IJAG will provide out of schedule reporting if an event or issue requires this.

21. Should you agree to this change you will receive the next India update during the IESOG meeting on 7 September, with the following report then due on 1 October 2016.

Appendix Two: India Student Market at a Glance July 2016

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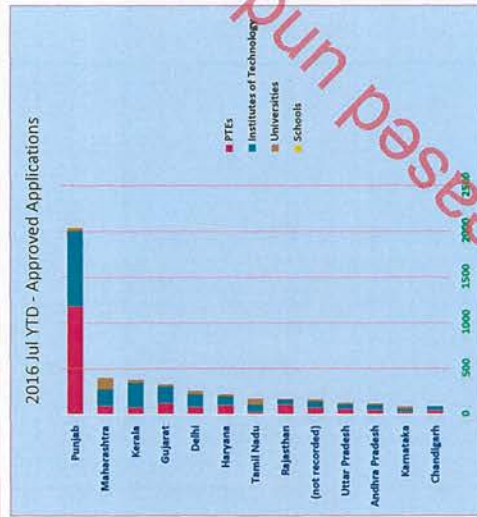
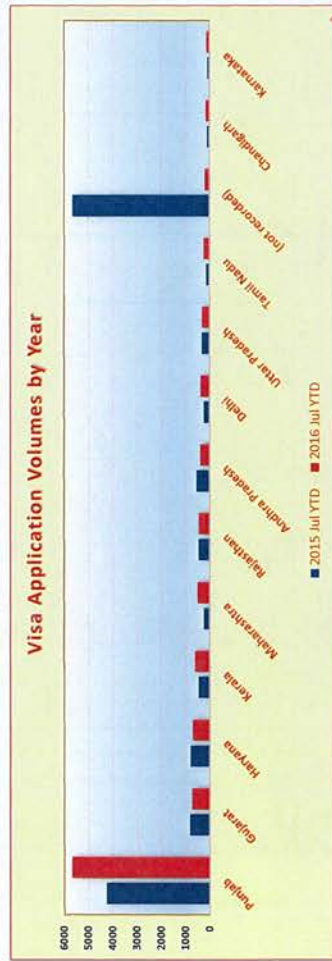
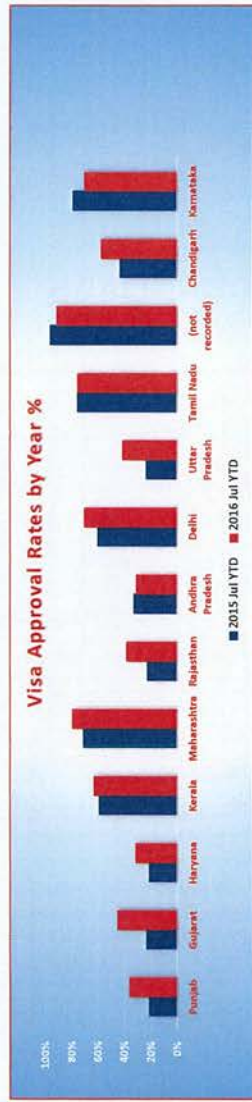
1. Student Visa Flows - All India Applications



Comments:

- The number of declined visa applications rose substantially between September and November 2015, coinciding with the pending Rule 18 English language change.
- Visa approval rates dropped to their lowest during this period.
- The India visa approval rate for July 2016 was 52%, down from 71% in July 2015, largely as a result of English language changes and closer INZ visa application scrutiny.

3. Visa Application Decisions via Mumbai Branch



Comments:
 • Volume from India based applications is originating from high risk states where visa approval rates are low; the PTE sector is driving much of this volume.

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NZQA July 2016

NZQA activity in relation to signatories to the Code of Practice for the pastoral care of international students

Formal Complaints	Received	Alleged Code Breaches
	11	4
Investigations*	In Progress	Code Signatory Related
	51	40
Statutory Interventions*		Code Signatory Related
		2

Source: NZQA

* The investigations & statutory interventions do not necessarily relate to a breach of the Code.

INZ August 2016

Between May (establishment of the INZ Taskforce) and 10 August 2016

Monitoring Visits	No. of Visits	Institution Type		
	38	PTE		
Student Deportations	Orders Issued	Notices Sent	Custodial Deportations	Self Deportations
	70	35	36	33

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Education New Zealand Briefing

Title:	New Zealand Residence Programme changes: Impact on the international education industry
Date:	06 October 2016
Priority:	Medium
Security level:	In Confidence
ENZ ID no:	1617-093

Action sought

Addressee:	Action sought:	Deadline:
Minister for Tertiary Education, Skills and Employment	Note the projected impact on the international education industry from New Zealand Residence Programme changes	
Enclosure:	Yes	Round robin: No

Contact for telephone discussion (if required)

Name:	Position:	Telephone:	Cell phone:	1 st contact:
Grant McPherson	Chief Executive	[REDACTED]	[REDACTED]	OIA s9(2)(a)
John Goulter	General Manager, Stakeholders, Communications & Intelligence	[REDACTED]	[REDACTED]	X OIA s9(2)(a)

The following departments/agencies have seen this report

<input type="checkbox"/> ERO	<input checked="" type="checkbox"/> MBIE	<input checked="" type="checkbox"/> MFaT	<input type="checkbox"/> MoH	<input checked="" type="checkbox"/> MoE	<input type="checkbox"/> MSD
<input checked="" type="checkbox"/> NZQA	<input type="checkbox"/> NZTE	<input type="checkbox"/> TEC	<input type="checkbox"/> TPK	<input type="checkbox"/> Treasury	<input type="checkbox"/>

Minister's office to complete

<input checked="" type="checkbox"/> Approved	<input type="checkbox"/> Declined	<input type="checkbox"/> Noted	<input type="checkbox"/> Needs change
<input type="checkbox"/> Seen	<input type="checkbox"/> Overtaken by events	<input type="checkbox"/> See Minister's notes	<input type="checkbox"/> Withdrawn

Comments:

Purpose

1. This briefing updates you on the potential impact on the international education industry from changes to the New Zealand Residence Programme (NZRP), particularly within the Indian market.

Background

2. The Minister of Immigration is introducing changes to the NZRP, particularly the Skilled Migrant Category (SMC). Many of these changes will affect Indian students either looking to or currently studying within New Zealand, if they plan to remain in New Zealand long term after their studies.
3. There will be two distinct sets of changes to the SMC. From October 2016 the selection criteria for SMC will be raised from 140 points to 160 points and the proxies for meeting English language requirements will be clarified. Then, from 2017 the SMC will undergo broader change with the introduction of salary thresholds and a realignment of the points system to prioritise the most highly skilled migrants. Both these changes are likely to impact students, but in different ways.
4. The changes are designed to ensure that the SMC effectively prioritises higher-paid and higher-skilled migrants and will achieve this by raising the bar for people who work in relatively low paid occupations and are not genuinely skilled.
5. The most significant impact in the international education context is likely to be on Indian and Filipino students studying level 5-7 diplomas and intending to use their education in New Zealand as a pathway to residence, especially those studying management and commerce within the private training establishment (PTE) sector. Due to the difference in volume between these two markets, this paper focuses primarily on the Indian market.
6. The announcement and implementation of these changes occur shortly before the Prime Minister's visit to India (24-27 October). Given the current issues within the Indian student market, IESOG agencies are working closely to ensure the visit is well supported and communications are aligned. The Prime Minister's visit is also being used to promote several positive initiatives within the industry.

Impacts and Long Term Recovery

The Indian Market and Pathways to Residence

7. The changes to the SMC provide an opportunity for International Education to undergo a necessary course correction as the sector has recently experienced high growth in students who see lower level qualifications as a pathway to residence. The growth in such students is putting pressure on the NZRP. While the changes are seen as a positive step towards increasing student quality, as students will recognise they need to become more highly skilled to qualify for residence in New Zealand, ENZ expects that there will be a slowing of growth in student numbers, requiring the continuation of work underway to ensure sustainable growth.
8. The changes will address the rise in graduating Indian students working towards residence under the SMC, illustrated by the increase in Indian student numbers from 13,000 enrolments in 2013 to 29,000 in 2015.

17. As a result, ENZ expects the changes will send a signal to the Indian student recruitment market, although the size of that impact cannot be predicted. ENZ projections indicate that even a drop of 30 percent in this particular market (Indian PTE students in level 5-7 diplomas) would not signal negative growth to the industry overall. ENZ projects the total number of international students enrolled with New Zealand providers should continue to grow at a sustainable rate of one to five percent annually, down from the 13 percent growth seen in the previous two years (refer to Appendix One for the detailed calculations).
18. These short term impacts will affect providers, particularly those who are heavily reliant on Indian students. ENZ is working with other agencies – NZQA and Immigration New Zealand – to assess the likely scope of affected providers.

Returning to Sustainable Growth

19. ENZ and other IESOG agencies are actively working together to address market issues in India. Key onshore initiatives to date include:
 - a. developing agreed cross-agency criteria to identify providers of concern who are not performing to the expected standard in the India market
 - b. communicating performance expectations to all providers and additionally, communicating concerns to identified providers with low student visa approval rates
 - c. collaborating to enhance agent behaviour including providing Indian agent performance data to New Zealand providers so they can make informed decisions about the agents they are working with, and to strengthen their ability to comply with the revised Code of pastoral care, and supporting pending recommendations about an agent approach which engages the sanctions and levers available to each IESOG agency to influence the behaviour of agents, providers and students in the recruitment process
 - d. outreach and communications to publicly express the need for collective responsibility in international education and in the India student market; this includes media opinion pieces, a presentation to the India New Zealand Business Council, and regular engagement by senior officials with the India High Commissioner to New Zealand; and regular updating and alignment of key messages by all IESOG agencies with a focus on supporting the Prime Minister's visit to India
20. Offshore work in the India market will continue to focus on strengthening our market presence and attracting high quality students – value over volume. This includes:
 - a. a market development strategy for the university sector to increase the presence of this high-value sector and improve product development to increase its market share in India. The initial stage is the commissioning of research on market development opportunities leading to activities such as product development, and in-market presence. This work is being conducted in conjunction with Universities New Zealand, and will be announced during the Prime Minister's upcoming visit to India.
 - b. high value promotional outreach programme to tell the good story including university and academic roadshows, school promotional series and student and alumni awards

Appendix One: Annual International Education Enrolments and Projections by Sector by Year

Released under the Official Information Act 1982

Annual International Education Enrolment Figures by Sector by Year (with Projections from 2016 to 2018)

Method B: 2% Annual Growth

Sector	Projections									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	
Primary	1,954	1,616	1,493	1,432	1,548	1,830	1,897	1,966	2,038	
Intermediate	1,049	1,080	1,025	926	862	689	617	553	495	
Secondary	14,354	14,299	14,143	14,438	15,097	15,408	15,701	16,001	16,305	
ITP	12,272	12,478	12,448	12,316	14,143	17,454	19,066	20,827	22,751	
PTE	51,797	51,823	46,267	43,763	53,653	63,599	63,599	63,599	63,599	
University	22,927	23,021	23,406	24,305	24,953	26,024	26,835	27,672	28,535	
Total	104,353	104,337	98,782	97,180	110,256	125,004	127,716	130,618	133,723	

	Annual Percentage Movement from the Previous Year (%)									
	2011	2012	2013	2014	2015	2016	2017	2018		
Primary	-17%	-8%	-4%	8%	18%	4%	4%	4%		
Intermediate	3%	-5%	-10%	-7%	-20%	-10%	-10%	-10%		
Secondary	0%	-1%	2%	5%	2%	2%	2%	2%		
ITP	2%	0%	-1%	15%	23%	9%	9%	9%		
PTE	0%	-11%	-5%	23%	19%	0%	0%	0%		
University	0%	2%	4%	3%	4%	3%	3%	3%		
Total	0%	-5%	-2%	13%	13%	2%	2%	2%		

Method B: Description and Observations

- *Method B adopts the same approach as Method A, applying a 4 year average to generate the annual projections.
- **The difference is the assumption made concerning the largest (PTE) sector.
- *Method B follows a more conservative path by making the assumption that the PTE sector will plateau from 2015, and observe no further growth in the years 2016 - 2018 i.e. zero growth.
- **The rationale underpinning this assumption is placing greater significance on the dampening of the Indian market; the effects of Rule 18 and tightening of INZ scrutiny, on the PTE sector.
- **This approach yields a more conservative forecast of 2% annual growth, driven primarily by the university and ITP sectors.
- *The below chart depicts actual and projected figures but where zero growth is conservatively assumed in the PTE sector (plateauing effect).
- *N.B These figures include all students i.e. Full fee paying, PHD, NZAID, exchange and foreign research postgrad students.
- **These figures are purely volumetric derived with no allowances for annual fee increases, particularly in the university sector.

Method B: Annual International Education Enrolment Figures by Sector by Year (with Projections from 2016 to 2018)



Aide Memoire: *Further advice on potential impact on export education of remuneration thresholds for migrants under the Skilled Migrant Category*

Date:	5 December 2016	Priority:	High
Security Level:	In confidence	METIS No:	1039255

Purpose

1. This Aide Memoire provides you with advice on the potential impacts on export education arising from the proposed income thresholds for migrants under the Skilled Migrant Category (SMC) [EGI16-SUB-0332].
2. The Minister of Immigration is seeking agreement to proposed remuneration thresholds to be used to determine whether employment is skilled, for the purpose of granting points for skilled employment under the SMC residence policy. You asked Education New Zealand, supported by the Ministry of Education, to prepare some modelling of the potential impacts on the international education sector.
3. We believe the proposed income threshold is likely to impact on international student numbers in New Zealand. We support the move to correct the overconcentration of international graduates entering Skilled Migrant Category (SMC) with low level qualifications. The proposed remuneration thresholds may impact on some subsets of the market more so than others. Along with those students directly affected, the move would send signals to New Zealand's international education markets about the relative attractiveness of the country as an education destination, particularly for markets with a strong migration focus.
4. Data from MBIE shows that in 2012/13 more than 50% of the international students who transitioned to residence would not have been eligible for SMC should the proposed income threshold have been applied then. The proposed remuneration threshold could mean that NZ could lose talent to other destinations and job markets including those in desirable skills areas or those who have attained higher qualification levels. For example, over 50% of former students with a Bachelors qualification who became skilled migrant principal applicants in 2012/13 earned below the threshold in first year after being granted residence.
5. The impact would be strongest on providers (mostly PTEs) which focus most strongly on level 5 – 7 qualifications, and those who cater predominantly for international students most motivated to migrate (for example, Indian and Filipino students) .
6. Many Indian students are enrolled at a small number of PTEs, enrolling in lower-level qualifications and motivated by migration outcomes. A substantial decrease in Indian student numbers will dramatically impact on the viability of some institutions. A number of ITPs have a heavy reliance on Indian students, and may be similarly impacted.

of 22%. Five ITPs have a ratio in the teens, and 10 ITPs have a ratio of less than 10%. Details can be found in Appendix 1.

15. We also note that the proportion of international students to domestic students can vary from course to course, meaning some provision may become uneconomical if there was a large reduction of international students in these areas.
16. Additionally, some ITPs may experience higher impacts, especially where international students are drawn from limited markets, or where separate international education campuses, focusing solely on international delivery have been established. This could impact on [REDACTED], in particular. Finally, a softening in the international education market may limit ITPs ability to respond to an already challenging operating environment, having been impacted by reduced demand and reductions in investment through TEC contestable processes.

OIA s9(2)(b)(ii)

Impact on key markets

17. India and the Philippines are most likely to be affected by this proposal because they apply for further visas after study at the highest rates. Many Indian students are enrolled at a small number of PTEs. A substantial decrease in Indian student numbers will significantly impact on these institutions. Similarly, a number of ITPs have a heavy reliance on Indian students (see Appendix 1).
18. Like India, the Philippines is another migration driven market, which is currently small. It grew very fast in the last a few years but has already been impacted since the implementation of Rule 18 (which reintroduced English language requirements removed in 2013). With 2,600 students at PTEs and 850 students at ITPs in 2015, the Philippines market will be affected but it is difficult to quantify the impact. Filipino students only accounted for 1.8% of SMC residents in 2014/15.

Impact of other government changes already made

19. A number of changes have been made by the government to immigration settings since 2015. Total student visas (TSV) are down -4% (-3,123) and first time student visas (FSV) are down -13% (-4,963) for the October 2016 year to date. While student visas are down on 2015, enrolments are 9% up on 2015 in January to August 2016. This means we have not yet seen the impact of these changes flow through to enrolment numbers.

Rule 18

20. When the Government relaxed English language requirements in 2013, it led to a huge influx in students (Indian student numbers doubled, for example). When formal English testing was reintroduced in October 2015, many prospective international students were unable to meet the requirements and student numbers dropped. It is likely that many of the students who came in between 2013 and October 2015 may struggle to meet the SMC requirement for English.

Change to 160 points under SMC

21. MBIE has indicated that the number of Expressions of Interest (EOIs) selected has dropped by around 55% since the selection point change to 160 points. The number of EOIs that include a New Zealand qualification has dropped by around 35%. The top five occupations remained the same. However, skill level one occupations (nursing and ICT for example) appear to be less affected.
22. Cumulatively, ENZ expects these changes to continue to affect demand, particularly in markets where residence is a major motivation. Early indications of reduced first time visa numbers are expected to impact on enrolment numbers in 2017. To an extent, the fall-off

Appendix 1: Providers with potentially the most exposure

OIA s9(2)(b)(ii) PTE Provider ³	Jan-Aug 2016 Total	2015								
		Total	India	China	Korea	Japan	Philippines	Brazil	Nepal	Other
[REDACTED]	2,253	2368	1195	4	11	0	798	7	136	217
[REDACTED]	1,653	2049	956	358	127	170	110	4	48	207
[REDACTED]	2,136	1956	812	379	225	73	236	22	11	198
[REDACTED]	1,674	1869	631	799	183	30	21	2	7	119
[REDACTED]	1,200	1433	1174	188	31		2	4	7	27
[REDACTED]	1,346	1399		783	66	69	2	181	0	298
[REDACTED]	1,177	1383	515	46	66	47	39	35	84	551
[REDACTED]	1,340	1373	892	5	9	2	63	3	210	189
[REDACTED]	784	1316	1209	84		1	3	1	5	13
[REDACTED]	1,454	1196	592	401	59	3		34	3	104
[REDACTED]	827	1106	1079						21	6
[REDACTED]	1,317	979	300	443	72	14	10		21	42
[REDACTED]	869	974	318	355	134	1	76	1	3	86
[REDACTED]	659	956	510	386	12	1	29			12

Note: International Academy of New Zealand Limited would have been included on the list but has since been sold and closed.

³ Includes SDR and non-SDR providers.