
Briefing to the Incoming Minister

Education New Zealand November 2017



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Executive summary

International education is the movement of people and resources across national borders for education purposes. It includes both activity within New Zealand (education delivered to students from overseas) and activity outside New Zealand (education products/services delivered overseas and New Zealanders studying overseas). It is also about ensuring New Zealanders become global citizens with the international capabilities (skills, knowledge and attitudes) to effectively engage with the world.

International education is a complex industry that has grown to be New Zealand's fourth largest export. The industry is made up of six sectors which deliver social, cultural, educational and economic benefits to New Zealand, (domestic and international) students and communities. It generates export revenue, connects New Zealand with the rest of the world and helps New Zealanders have the skills, attitudes and knowledge to live and work in a globalised world.

The six sectors are the university, private training establishment, institutes of technology and polytechnics, English language, schools and offshore education products and services sectors.

Education New Zealand (ENZ) was established as a crown entity in 2011 to bring leadership and coherence to New Zealand's international education industry by supporting the industry to deliver on the Government's priorities for international education. As ENZ is funded by Vote Tertiary Education, the Minister of Education has responsibility for ENZ.

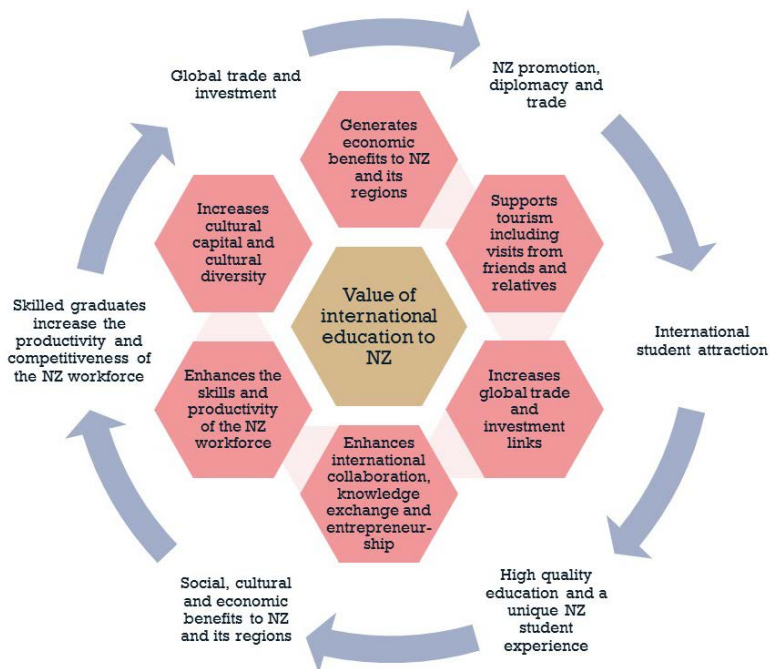
ENZ works at the intersection of industry, government and students. As the only government agency solely focused on international education, ENZ takes a leadership role with the industry and across government on international education. Part of this leadership role is ENZ providing insights and intelligence about international education to the industry and government. It also includes working closely with other New Zealand government agencies to create an environment in which international education can grow and international students can flourish.

ENZ promotes the high quality of New Zealand education to prospective international students and their families, education agents and other governments. We leverage the offshore promotional activities of other NZ Inc. agencies – such as the Ministry of Foreign Affairs and Trade, Immigration New Zealand, New Zealand Trade and Enterprise and Tourism New Zealand – to raise the profile of New Zealand education. As the only New Zealand education sector agency with an offshore presence, we support New Zealand's bilateral education diplomacy work and support the other education agencies' work to deliver their international education objectives.

ENZ works with education providers, peak bodies and New Zealand's regions to strengthen the industry and its capability. This includes assisting the industry to identify new opportunities for growth. ENZ also works with other New Zealand government agencies and the industry to ensure international students continue to receive a high quality experience while living and studying in New Zealand, and to deepen understanding of the social, cultural and economic benefits of international education within New Zealand. In addition, ENZ provides scholarships to New Zealand students for a period of time to increase their capability to effectively engage with the world.

International education

Why focus on international education



The international education industry is growing worldwide. According to the OECD’s “Education at a Glance 2017”, the number of foreign students engaged in tertiary education programmes worldwide has “exploded within a generation, rising from 0.8 million in the late 1970s to (a forecast) 4.6 million 45 years later”. ENZ helps New Zealand gain the most benefit from international education by:

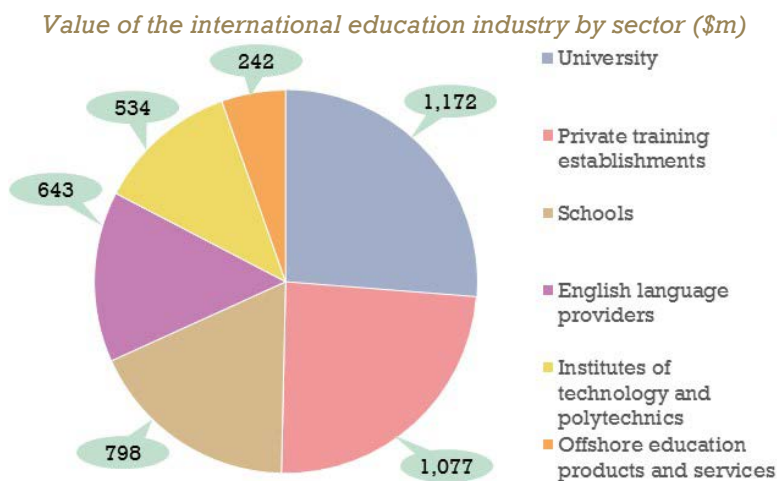
- attracting international students to study with New Zealand providers – both onshore and offshore
- sending New Zealanders offshore to study to strengthen their understanding of other cultures and build the skills of the New Zealand workforce
- working with education providers and other government agencies so international students have a high quality experience while studying in New Zealand
- encouraging growth in the value of international education across New Zealand so the benefits are more evenly spread across the country
- encouraging former international students to maintain their linkages with New Zealand after they have finished studying – they can open doors for New Zealand exporters and New Zealand’s diplomatic efforts.

Introduction to the New Zealand industry

The success of New Zealand’s export industries is crucial to New Zealand’s growth – international education is New Zealand’s fourth largest export industry and second largest service export (tourism is larger). The New Zealand international education industry is made up of over 800 education providers and businesses, supporting 33,000 jobs across New Zealand.

International student numbers have been growing since 2014 after a number of flat years caused by the Global Financial Crisis and Canterbury earthquakes. In 2016, 131,609 international students¹ studied with New Zealand education providers (3,217 of them studied offshore). As the length of study can range from a two week English language course to a multi-year degree, not all international students who come to New Zealand study in New Zealand for the full academic year.

The international education industry adds \$4.5 billion² to the economy. In less than five years, international education has grown by more than \$2 billion. This growth means that the 2025 target of the industry being worth \$5 billion³ is within reach.



Beyond the pool of globally mobile students who can afford to physically study and live in a host country like New Zealand, there is a much larger pool of learners who could benefit from New Zealand education and training delivered online or in their own country or region. Currently less than 5% of New Zealand’s international education industry value comes from offshore education products and services which includes publishing, education technology, education consulting and delivery of New Zealand qualifications and training offshore – in contrast to countries like Australia (30%) or the United Kingdom (50%).

Growing our offshore education products and services offers the opportunity to grow the industry’s and enhance New Zealand’s reputation for education excellence globally, without international students coming to New Zealand. Unfortunately, New Zealand’s current approach to offshore delivery is too ad-hoc and fragmented to scale successfully. However, ENZ has developed an international delivery approach that explores alternatives options to drive growth.

New Zealand’s international student markets

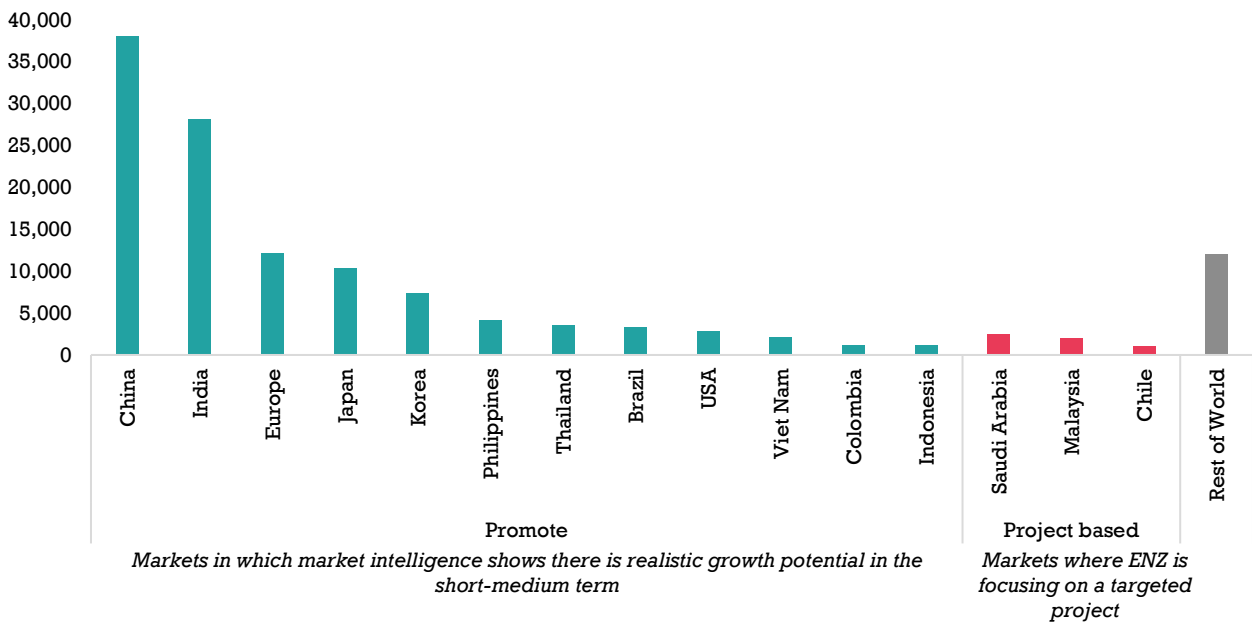
Students from over 170 countries studied with New Zealand providers in 2016. ENZ prioritises 15 markets to focus its activities to diversify New Zealand’s major markets and move away from an over reliance on China and India.

¹ International students are non-residents of New Zealand who have entered into New Zealand expressly with the intention to study, or have enrolled in a New Zealand provider offshore.

² Source: *New Zealand International Education Snapshot: 2016 Full Year Report*. The industry’s value does not include the value of New Zealanders studying offshore.

³ This target was set in the [Leadership Statement for International Education \(2011\)](#).

2016 international student enrolments at a New Zealand provider for ENZ's priority markets



Benefits to New Zealand of international education



Encourages young New Zealanders to learn and study alongside people from other cultures



Establishes friendships and connections that can last a lifetime



Brings economic growth to every community in New Zealand



Expenditure by international students supports 33,000 jobs



Supports highly skilled, locally educated migrants



Increased diversity in education providers and communities encourages new ways of thinking and doing things



Average value of expenditure by each international student is \$33,460 per year

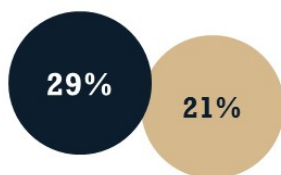


Strengthens government to government relationships through educational diplomacy

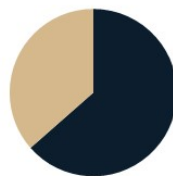
Current issues facing New Zealand's international education industry



The market is in a rebalancing phase
Much of the 2014-2016 growth has been in low value international students



China and India dominate
Over half of New Zealand's international students come from China and India



Auckland dominates
Nearly two thirds of international students study in Auckland



New Zealand is not top of mind
13% of students rate New Zealand in their top three preferred education destinations

There are cross-agency strategies in place to address the current issues facing international education in New Zealand. It will be important to improve the sustainability of the industry by managing and mitigating the risks of future downturns and external shocks. New Zealand could have a higher value international education industry that delivers increased benefits to New Zealand. ENZ along with other government agencies, such as Immigration New Zealand and the Ministry of Education, can help the Government achieve its priorities for international education. We would like to work closely with you to implement the Government's priorities for the future of international education.

The market is in a rebalancing phase

Like other export industries, as the growth of the international education industry can have unintended impacts. This creates a series of complex policy relationships in key areas such as education, immigration, regional development, trade and the labour market which offer both opportunities and risks that need to be managed.

New Zealand's international education industry is moving from high volume to high value. For the future New Zealand needs to ensure it is focusing on quality qualifications that reflect well on New Zealand's education system and deliver good value to New Zealand. There are opportunities to increase the benefits to New Zealand by continuing to move from a "volume" to a "value" focus, such as through supporting higher level study, diversifying the mix of international students or developing international education in New Zealand's regions. The shift to a value focus needs to be supported by immigration settings which also maximise the labour market outcomes of international students to benefit New Zealand.

Much of the growth in international student numbers in 2014-2016 was in lower value provision, particularly students from India studying at private training establishments. The speed of growth created some risks for New Zealand and the industry including high student visa decline rates, fraudulent information being included in visa applications, concerns around the labour market outcomes for some groups of international students, and concerns around the wellbeing of international students.

The strengthening English language requirements, tightening up of immigration settings and compliance, alongside rigorous attention to provider quality issues has seen a significant reduction in the number of international students studying at private training establishments in 2017, while the number of students studying at universities has increased. Government agencies need to continue to deal swiftly with poor quality providers and inappropriate behaviour, and stop poor performing organisations from being able to enrol international students. ENZ will continue to work closely with the New Zealand Qualifications Authority and Tertiary Education Commission on these issues.

The ability to work both during and after study can be an important factor in some students' choice of study destination and students will compare New Zealand's settings with the offerings of our competitor countries. It is important that the Government's regulatory settings maintain an appropriate balance between enabling New Zealand providers to attract international students, while managing labour market impacts and education quality issues.

Further changes to immigration settings would have impacts on the industry that would need to be managed. A reduction in the number of students (even if offset by an increase in overall value through a higher average spend per student here) could have a detrimental financial impact on some providers (including state-owned institutions) and impact New Zealand's diplomacy and labour market, including the number of jobs supported by the industry.

China and India dominate

New Zealand has typically relied on a few key markets as sources of international students. The current reliance on two key markets, China and India, for onshore student enrolments is also a risk to the industry's sustainability, and the need for market diversification is understood by government agencies and the industry. ENZ prioritises 15 countries / regions in which to focus its promotional efforts to increase the number of international students coming from countries other than China and India and to gain the best value for New Zealand.

Auckland dominates

Regional growth of the industry has been uneven. Nearly two thirds of student enrolments and subsequent export earnings are concentrated in Auckland. The constraints of education provider capacity, particularly in schools and for post-graduate student supervision, may also limit the growth of the industry. Other regions are well placed to increase activity in the international education industry and a number of regional economic strategies have an explicit focus on international education.

ENZ works collaboratively with local and regional governments, economic development agencies, and education provider clusters or organisations to grow, support and advocate for international education in 15 metro and regional centres.



The priorities for ENZ's Regional Partnership Programme fall into six key areas of focus.

- Regional destination marketing supports regions to define their unique selling proposition and collectively take their distinctive educational products to the world.
- Regional capability builds the regional network and raises industry capability. Regional partner workshops bring regional coordinators together to develop capability and inform best practice in regional development.
- Regional intelligence provides specific and timely data and intelligence to give regions access to data, including economic impact reports and provider-level data.
- Regional student experience by supporting regional groups' projects to enhance the international student experience. These projects can include the development of pre-arrival tools, student ambassador programmes and events encouraging integration.
- Regional employability supports the retention and attraction of talent to meet regional skills shortages.
- Telling the story in the regions with regional coordinators working closely with ENZ to identify and develop positive news stories for regional media channels which communicate the benefits of international education to New Zealanders in their communities.

New Zealand is not top of mind for international students

ENZ research shows 13% of prospective students in ENZ's priority markets rank New Zealand in the top 3 of their preferred countries to study in (usually along with the United States and United Kingdom). Research also shows the New Zealand education brand is strongly positioned in a "Nurture" space, driven by potential students associating the brand with safety, welcoming people, comfortable lifestyle and a scenic environment. This contrasted with the "Status and Success" position of the United States and United Kingdom education which is driven by students' stronger associations with these countries around education quality, status and career outcomes.

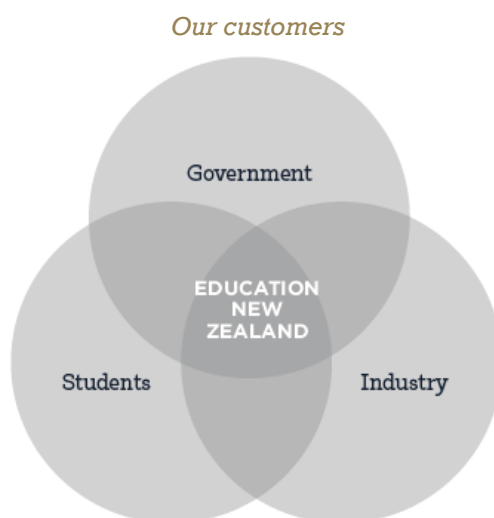
ENZ is taking a data driven approach to marketing and promotion along with a focus on growing awareness through public relations, digital advertising and social media to re-position New Zealand education internationally. ENZ is implementing a database marketing project that will create a seamless student journey: engaging with the student from attraction to study (student experience) and as alumni, fostering advocacy. This approach is now being distilled into a new brand strategy which will be used to further focus our activity and messaging to position New Zealand as a high quality education destination for students. At 18 October 2017, 30,000 people had provided our marketing database with their name and email address and a further 12,000 also provided information about their interests and level of study.

Education New Zealand

ENZ works with international and New Zealand students, the international education industry and government agencies in New Zealand and offshore.

Who we are

ENZ is the only New Zealand government agency solely focused on international education. ENZ is a crown agency which was established in 2011. Its statutory functions are shown in Appendix 1. ENZ supports the achievement of the government's priorities for international education, works with the international education industry and brings the international student voice into decision making.



ENZ is funded through three Vote Tertiary Education appropriations – two of which fund scholarships. The main appropriation, international education programmes, funds ENZ's work to lead international education as well as its marketing, promotion and industry capability development work. In 2017/18 ENZ's operating budget is \$33.978 million and an additional \$4.550 million to fund scholarships is administered. Additional information on the budget is in Appendix 2.

ENZ employs 88 full time equivalent (FTE) staff spread across the world. With assistance from the Ministry of Education, you appoint the Board that governs us. The ENZ Board members are:

- Charles Finny (Board Chair) – term ends February 2019
- John Morris – term ends August 2018
- Karen Rolleston – term ends October 2019
- Dr Linda Sissons – term ends October 2019
- Richard Leggat – term ends June 2018
- Philip Broughton – term ends June 2018
- Victoria Spackman – term ends July 2018.

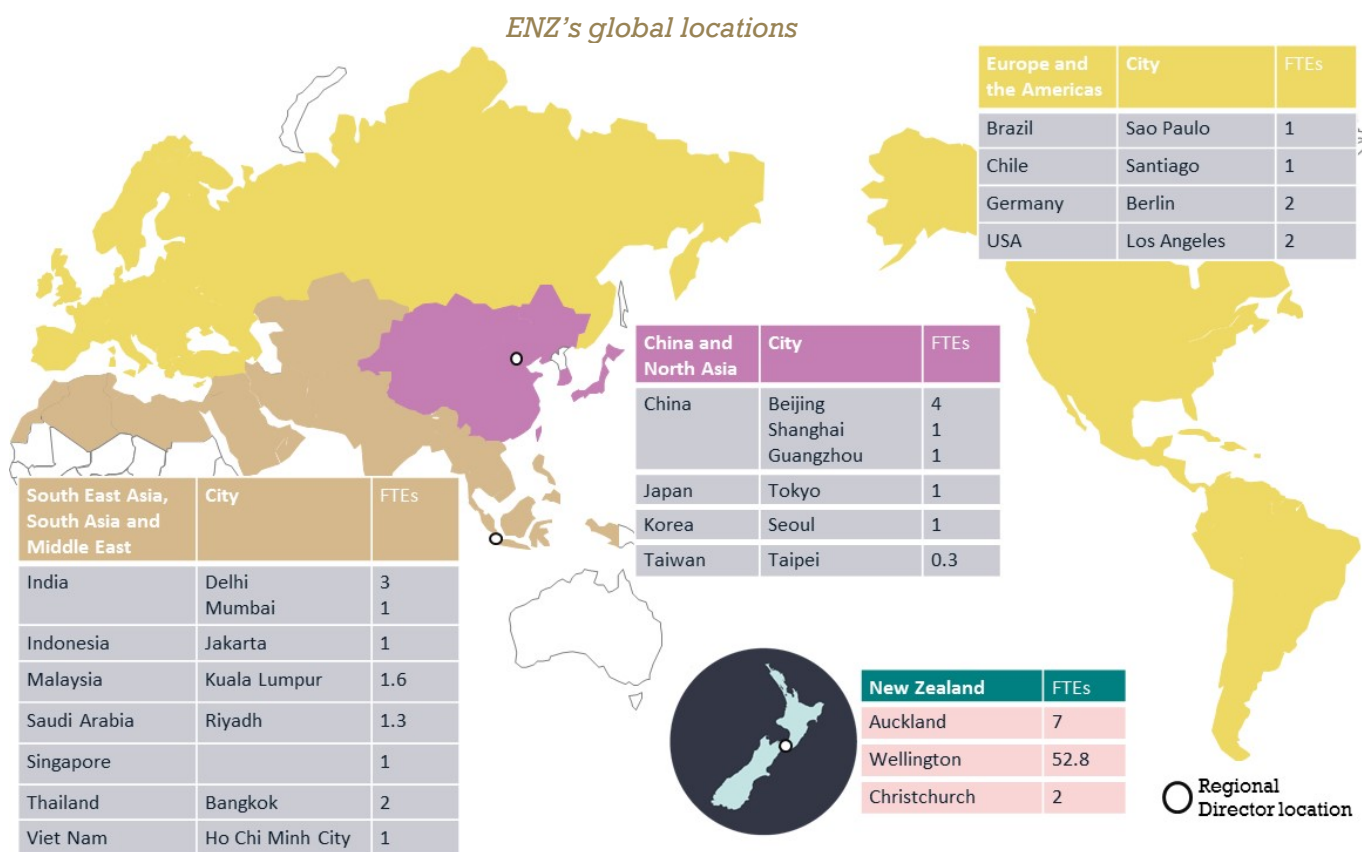
The ENZ Board members' biographies are in Appendix 4.

A number of special advisers to the Board help guide and shape the Board's work and ensure connections with the strategic direction of other agencies. The special advisers are the Chief Executive of the Ministry of Education, the Chief Executive of the Ministry of Foreign Affairs and

Trade, the Chief Executive of the New Zealand Qualifications Authority and two Deputy Chief Executives from the Ministry of Business, Innovation and Employment.

Where ENZ's staff are located

ENZ's offshore staff are co-located with other government agencies in New Zealand Embassies and High Commissions. Offshore staff leverage New Zealand's international diplomacy programmes, gather market intelligence and promote New Zealand education to prospective international students and their families, agents and other governments. ENZ's offshore staff are grouped into three regions.



ENZ's work

Leadership

- ENZ and the Ministry of Education have been developing a draft International Education Strategy for the New Zealand government to revise objectives, build on successes and address challenges that have arisen as the industry has grown. The draft strategy summary is shown in Appendix 3.
- ENZ works closely with the Ministry of Education, Immigration New Zealand, the New Zealand Qualifications Authority, the Ministry of Business, Innovation and Employment and other New Zealand government agencies to influence policies that affect students' and education providers' decision making.
- ENZ provides research, insights and intelligence about international education to the industry and other government agencies. Part of this is monitoring, analysing and reporting on student visa numbers, international student numbers and the value of the industry to

New Zealand and gather insights about international students to inform decision making by ENZ, the industry and New Zealand government agencies.

- ENZ also works with other New Zealand government agencies and the industry to ensure international students continue to receive a high quality experience while living and studying in New Zealand. The focus is on the whole student experience, from raising awareness of New Zealand education to having an high quality experience while in New Zealand and encouraging students to maintain their linkages with New Zealand post-study.
- ENZ works with the industry and regional economic development agencies to help New Zealanders understand the economic, social, educational and cultural benefits of international education.

Marketing and promotion

- ENZ positions the New Zealand “Think New” education brand in other countries. To do this, ENZ prioritises 15 markets in which to focus its promotional activities to attract international students to New Zealand. ENZ runs the “Study in New Zealand” social media community on Facebook, Instagram, Snapchat, Twitter, WeChat and Weibo to raise awareness of New Zealand education and runs the “Study in New Zealand” website which helps guide prospective international students through the overseas study process from deciding where to study through to getting ready to leave to study.
- ENZ runs offshore events, such as education fairs and agents seminars, in ENZ’s priority markets to promote studying in New Zealand. To promote New Zealand providers, ENZ offshore staff attend commercial education fairs to promote New Zealand education and support New Zealand education providers to attend them.

Scholarships

- ENZ promotes and manages the Prime Minister’s Scholarships for Asia and Latin America. These scholarships enable New Zealanders to undertake study in those regions with the aim of strengthening New Zealanders’ understand of other cultures and strengthening New Zealand’s ability to engage with its trading partners.
- ENZ promotes and administers the New Zealand International Doctoral Research Scholarships which bring top international doctoral students to undertake their doctoral studies in New Zealand.

Industry development

- To support industry growth and improve the industry’s capability, ENZ offers services such as advice and support for business and market development. This includes working with or providing advice through peak bodies such as Universities New Zealand, the Schools International Education Business Association and the Publishers Association of New Zealand.
- ENZ works with education providers, local government and regional economic development agencies in New Zealand to support and encourage regional growth in international education. Activities include supporting capability building and encouraging the increased co-ordination of the industry within a region.

How would you like to engage with ENZ?

We would like to talk with you about any additional information you would like and are happy to discuss with you any particular areas of international education you are interested in.

We would like to engage with you on a regular basis about international education and ENZ. If you want, we can engage with you by:

- discussing with you and briefing you on ENZ's activities and any issues that arise
- ENZ's Board Chair and Chief Executive meeting with you on a monthly basis
- providing you with:
 - fortnightly reports about ENZ's activities
 - monthly student visa dashboards
 - quarterly reports against ENZ's Statement of Intent and Statement of Performance Expectations
 - trimester international student enrolment dashboards
 - attending officials meetings.

As international education is a key export earner, we believe it is important for ENZ to also engage with the Ministers responsible for Trade and Export Growth, and Regional Economic Development, and we would like to discuss with you how best to do this.

Where to find more information

Please visit:

- our industry facing and corporate website (www.enz.govt.nz)
- our student facing website (www.studyinnewzealand.govt.nz) which promotes New Zealand to international students considering study in New Zealand and their parents.

To see the online industry support ENZ provides, please join:

- our IntelliLab (<https://intellilab.enz.govt.nz/>) which is a one-stop-shop for information and market intelligence on international education in New Zealand
- our Brand Lab (<http://thebrandlab.enz.govt.nz>) which has a wealth of marketing and promotion material which organisations can access
- our Skills Lab (<https://skillslab.enz.govt.nz/>) which provides an online toolkit for New Zealand providers of international education to grow their business by providing them with projects, advice and tips on a range of topics.

Appendix 1: ENZ's statutory functions

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

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

Appendix 2: ENZ's budget

Revenue and expenditure summary (\$000s)	2017/18 Budget	2018/19 Plan
Revenue		
International education programmes (including funding from the Export Education Levy ⁴)	31,072	31,072
Awards for outbound New Zealand students (funds the Prime Minister's Scholarships for Asia and Latin America)	3,750	4,250
Scholarships for inbound international students (funds the New Zealand International Doctoral Research Scholarships)	800	800
Other revenue (events, interest) ⁵	2,906	2,906
Total revenue	38,528	39,028
Total expenditure	38,528	39,028
Net surplus/(deficit)	-	-

⁴ \$3.265m of the international education programmes appropriation is funded by the Export Education Levy which is paid by education providers and administered by the Ministry of Education.

⁵ ENZ partially recovers the cost of offshore events that promote New Zealand education (such as education fairs and agent seminars) from participants.

Appendix 3: Draft International Education Strategy for New Zealand

The goals for international education need to be broad, focusing on the economic, social, educational and cultural benefits to New Zealand.

A draft International Education Strategy has been developed to revise objectives, build on successes and address challenges that have arisen as the industry has grown. The draft Strategy reflects the key issues and challenges for the industry, and sets broad goals for international education up to 2025, encompassing the economic, social, educational and cultural benefits of international education in New Zealand. The draft Strategy aligns with strategies and directions in related areas, including tourism, the export sector, research and innovation, and foreign affairs and trade.

Agencies plan to seek Ministers' views in November about whether to publish an International Education Strategy (agencies have consulted with industry on a draft Strategy in mid-2017 and received broad support for the proposed approach) or to consider other approaches to move forward from and revise the goals in the 2011 Leadership Statement for International Education.

What success could look like in 2025

International education provided at home and globally contributes to a vibrant and prosperous New Zealand.



The draft strategy framework above is supported by a narrative that outlines a proposed future direction for international education in New Zealand through to 2025. It is also underpinned by a set of draft statements that outline broad actions that could be undertaken.

Appendix 4: Biographies of ENZ’s Board and Leadership Team

Biographies of ENZ’s Board members

	Biography
Charles Finny Board Chair	Mr Finny is a partner at Saunders Unsworth Ltd. He was CEO of the Wellington Regional Chamber of Commerce (2005-2010), and prior to that worked as a diplomat and trade official, including postings in China, Taiwan and Singapore. Mr Finny is a member of the Board of New Zealand Trade and Enterprise, Woolyarns and Kawarau Estate Limited. He is also a former Chair of the Local Government Forum.
John Morris	Mr Morris is a secondary education specialist with nearly 40 years' experience in the education sector. He has held a number of leadership roles, including as Headmaster at Auckland Grammar School. He is the Chairman of the Association of Cambridge Schools in New Zealand, a member of the Partnership Schools' Authorisation Board and the Tertiary Education Commission Board and a Director of Academic Colleges Group. Mr Morris is also a former Chairman of the Education Forum and a former member of the University of Auckland Council. He runs his own education consultancy.
Karen Rolleston	Ms Rolleston is the Chief Executive at Telco Technology Services. Prior to that she was the New Zealand Chief Executive for 3P Learning Ltd, a global Australian online education company specialising in literacy and numeracy programs for schools and students. She has also been the Managing Director of Manzana Ltd. Ms Rolleston has held directorship roles with Limestone Risk Management Ltd, 2Touch Technologies and Interactive Whiteboards Australia Pty Ltd.
Dr Linda Sissons	Dr Sissons is the Chief Executive of the Primary Industry Training Organisation. Before that she was the interim Chief Executive of Taratahi Agricultural Training Centre and the Chief Executive of the Wellington Institute of Technology and of Hutt Valley Polytechnic. Dr Sissons is the Chair of the Board of Governors of the Commonwealth of Learning.
Richard Leggat	Mr Leggat has a varied background across business, marketing and e-commerce. He worked for apparel manufacturer Lane Walker Rudkin before switching into the finance sector and working as a share broker in New Zealand and London. Mr Leggat is on the boards of New Zealand Post, Snow Sports NZ, Cycling NZ, and is the Chairman of the NZ Cycle Trail Inc., Deputy Chair of the New Zealand Tourism Board and Director of Development Auckland.
Philip Broughton	Mr Broughton (Ngāi Tahu and Kahungunu) has 35 years' experience as a chartered accountant, mentor and business advisor. He is a consultant with Polson Higgs with responsibilities for Māori business. His governance experience includes roles as President of the Otago Southland Employers Association, Chairman of Well Dunedin Health Trust, Deputy Chair of the Advertising Standards Complaints Board, member of Te Kupeka Umaka Māori ki Araiteuru (Southern Māori Business Network), immediate past President of Business New Zealand, board member of Kiwi Haka Ltd and past board member of Ngai Tahu Tourism Ltd.
Victoria Spackman	Ms Spackman is Director Creative and Director Te Auaha at Weltec and Whitireia Polytechnics (Te Auaha is the School of Creativity). She is also a director and co-owner of the screen and visitor experience company the Gibson Group and was its Chief Executive. Ms Spackman's governance experience includes being a board member of Screenrights, committee member FirstBoards (of the Institute of Directors), and the Screen Production and Development Association. She is an Officer of the New Zealand Order of Merit for services to theatre, film and television.

ENZ's Leadership Team

There are four leadership team members you are likely to meet in the next few months.

	Biography
Grant McPherson Chief Executive	Grant McPherson leads ENZ on its mission to take New Zealand's "education experiences to the world for enduring economic, social and cultural benefits". Grant's previous experience includes roles as Deputy Chief Executive and General Manager, Strategy at New Zealand Trade and Enterprise, following extensive experience as Regional Director, South/South East Asia and Group General Manager, Business Solutions on the New Zealand Trade and Enterprise Leadership Team.
John Goulter General Manager, Stakeholders and Communications	John joined ENZ in December 2013. He has broad experience in government relations, issues management and public affairs, having worked for organisations including Inland Revenue, Telecom NZ and the Earthquake Commission, and as chief press secretary in the Prime Minister's Office. Formerly a journalist, John was a political editor in the Parliamentary Press Gallery.
Clive Jones General Manager, Strategy and Insight	Clive joined ENZ in 2012, coming from a role as Deputy Chief Executive, Universal College of Learning (UCOL). Before joining UCOL, Clive worked in telecommunications, local government and in the electricity industry in a variety of managerial roles. Clive formerly held the role of General Manager, Business Development at ENZ.
Paul Irwin General Manager, Student Marketing	Paul joined ENZ from advertising agency FCB Wellington, where he led the Wellington office for almost five years. He has extensive experience in marketing strategy, digital marketing, international marketing and team management, from 15 years experience in a range of management roles.