



# PTE SECTOR STRATEGIC ROADMAP

Final Summary

# CONTENTS

Foreword .....	02
Overview.....	03
Purpose .....	04
Destination 2025 .....	05
Strategic themes .....	06
Strategic choices: <i>Markets</i> .....	07
Strategic choices: <i>Products &amp; Pathways</i> .....	11
Strategic choices: <i>Resourcing</i> .....	15
Strategic choices: <i>Capability &amp; Leadership</i> .....	18
Strategic choices: <i>Partnership</i> .....	22
Priority choices.....	26
Next steps .....	27
Acknowledgements.....	29

Disclaimer: The views and opinions expressed in this document are solely those of the author and/or the contributors and do not necessarily represent the views of Education New Zealand.

Gate	Departures	Time
A2	AUCKLAND	09:45
B2	DUBAI	10:15
B1	GENEVA	10:50
C2	NEW YORK	11:00
A2	HONG KONG	11:20
B2	SEOUL	11:45
A1	KUALA LUMPUR	12:00
B3	LONDON	12:25





# FOREWORD

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The Leadership Statement for International Education was released in September 2011 – setting targets that include doubling the economic value of international education to \$5 billion by 2025.

The Leadership Statement outlined proposed actions for achieving this target, based on trends and predictions at that time. We all know that the international education market has changed – emerging student markets, the increasingly important role of technology, new competitors and products, and different expectations about how and when learning and assessment will take place. Commentators agree that this pace of change will continue.

There is also agreement that globally the number of students seeking an international education experience by 2025 will be in the region of 8 to 9 million and that there are many opportunities to grow and succeed if our education packages are flexible and able to continue to meet student expectations. This is at the heart of the roadmaps process. How does each segment of the industry need to position itself to respond to new opportunities and challenges and what is the industry's view of success in 2025?

**“The next step is to ensure that this industry view is reflected in government and industry planning documents....”**

I've been heartened by the way the industry has embraced the roadmaps development process. Each sector's roadmap process has been led by a respected person from that sector and over 400 industry participants have directly had input into this product: either through workshops, interviews or questionnaires.

The next step is to ensure that this industry view is reflected in government and industry planning documents to provide a meaningful way ahead for individuals, businesses and agencies. I look forward to working with you all to make this happen.



**Grant McPherson**  
Chief Executive  
Education New Zealand



# OVERVIEW – HOW THIS ROADMAP WAS DEVELOPED

The development of a roadmap for the Private Training Establishment (PTE) sector of New Zealand's international education industry has been facilitated by Education New Zealand as part of developing an overarching international education industry roadmap.

The process for developing an international education industry strategic roadmap commenced in early December 2013 and has involved a team of independent Project Managers working with key sector advisors and international education providers to produce a roadmap for their respective sectors via:

- > 10 sector-based roadmap development workshops held in Auckland, Wellington and Christchurch with over 370 industry participants
- > 117 in-depth interviews with key industry participants

- > Analysis of nearly 220 opportunities for industry growth
- > 7 regional 'test drive' workshops held in Auckland, Hamilton, Wellington, Christchurch, and Dunedin with over 200 industry participants

This sector roadmap should be read in conjunction with the following related sector documents:

1. PTE Sector Discussion Paper
2. PTE Sector Roadmap Workshop Outcomes & Key Themes
3. PTE Sector Interview Summary
4. Innovation Café Discussion Paper
5. Innovation Café Workshop Outcomes & Key Themes



# PURPOSE

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This roadmap has been developed by the PTE sector of New Zealand's international education industry to guide its future growth and success towards 2025.

The roadmap contains a number of 'strategic choices' and 'specific actions' which have been identified as key enablers of future success.

It is important that the strategic choices contained in the roadmaps are seen as just that – *choices*. They may only be relevant to some providers, either individually or as groups, or in conjunction with government or the private sector.

# DESTINATION 2025

		CURRENT	2025 SCENARIO 1	2025 SCENARIO 2
<b>PARTICIPATION</b>	Number of international education providers	167	220	200
<b>ENROLMENT</b>	Students	27,371	41,359	54,000
	Average students per PTE	164	188	270
<b>VALUE</b>	Tuition fee income	\$190m	\$347m	\$460m
	Tuition fees per student	\$4,864	\$8,404	\$8,404
	EVA	\$569m	\$1,028m	\$1,354m

# INDUSTRY ROADMAP STRATEGIC THEMES

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Markets

Products and  
Pathways

Resourcing

Capability  
and  
Leadership

Partnership

# MARKETS OVERVIEW

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We will leverage the New Zealand country brand, our quality in-market relationships and the full value of our alumni and business networks.

We will tell the New Zealand PTE Education story to a larger audience within highly targeted segments and a more diversified range of markets.

We will be known for the high quality of our products.

We will use market intelligence to better understand the needs of the customer and digital channels to reach our defined audience.

Easy access to staff of NZ Inc agencies located offshore is critical to help PTE's navigate local bureaucracy, rules and regulations.



# STRATEGIC CHOICES — MARKETS

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**1**

**Build on existing markets while also diversifying into new markets**

**2**

**Strengthen the position of New Zealand PTEs as a quality brand**

**3**

**Develop a more effective and continuous presence offshore for clusters of PTEs**

**4**

**Make it easy for students to apply and enrol – a seamless experience**

**5**

**Develop greater consistency and depth in agent engagement and practices**

**6**

**Develop the full potential of personal relationships with our students, families and alumni**

# MARKETS

		DURATION (YEARS)		
STRATEGIC CHOICES	SPECIFIC ACTIONS	0 - 3	3 - 5	5 - 10
<b>1</b> Build on existing markets while also diversifying into new markets	Implement a NZ Inc. approach to target markets, new and existing	■	■	■
	Reduce barriers to entry into new markets through shared services and effective use of market intelligence	■	■	■
	Support shared marketing activities, working with clusters of PTEs and other providers to increase scale	■	■	■
<b>2</b> Strengthen the position of New Zealand PTEs as a quality brand	Reward the best performers and good practice by reducing compliance costs and providing NZ Inc. support	■	■	
	Leverage off In-market New Zealand PTE graduate ambassadors (alumni)		■	
	Rebrand PTEs e.g. independent specialist institutions	■		
	Develop a New Zealand "Imprimatur" quality brand	■		
<b>3</b> Develop a more effective and continuous presence offshore for clusters of PTEs	Professional in-market NZ Inc. events – "bring the 'A' team"	■	■	■
	Provide permanent in-market landing pads with market intelligence, network contacts shared back office functions in target markets		■	■
	Implement New Zealand quality-assured pathway programmes for offshore institutions including online	■	■	■

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

# MARKETS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
4	<b>Make it easy for students to apply and enrol – a seamless experience</b>	Develop a one-stop shop for study and visa applications	■		
		Develop a single portal for prospective customers interested in studying in New Zealand, with gateways to the easy-to-follow online application and information sources	■		
5	<b>Develop greater consistency and depth in agent engagement and practices</b>	Develop a standard New Zealand PTE agent agreement template	■	■	■
		Support PTEs and providers clustering to employ ‘brand partner’ in-market agents – credentialisation	■	■	■
		Develop a long term strategy around commission rates	■	■	■
6	<b>Develop the full potential of personal relationships with our students, families and alumni</b>	Use social networking systematically to increase customer awareness, secure brand loyalty and collect and respond to customer feedback	■		
		Publicise alumni successes to support network building in New Zealand and offshore	■	■	
		Provide enhanced support for kiwi students and PTE staff to experience an education overseas	■	■	■

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# PRODUCTS AND PATHWAYS OVERVIEW

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To achieve sustainable growth in the value of international education, high quality, niche boutique education products will be developed that meet the future needs of global students in fields where New Zealand has a competitive advantage.

Product development will be focused on areas where New Zealand has labour market and brand strength (e.g. food and beverage, sports, aviation, agribusiness, health).

We will avoid competing on cost against competitor nations which have benefits of scale and proximity to target markets.

Delivery must be more diversified, including the use of offshore and blended learning. We will strengthen pathways within our education system and to employment and residency.

Concurrently, the quality of student / family support and experience must be enhanced by standardising best practice and working collaboratively with related industry sectors, such as tourism.

# STRATEGIC CHOICES – PRODUCTS AND PATHWAYS

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1

Develop niche / boutique programmes aligned to NZ Inc. export priorities and national strengths

2

**Pre-enrolment to permanent migrant pathways**

3

Focus on developing excellence in distance education, blended learning and digital literacies

4

**Increase attractiveness of PTE programmes**

# PRODUCTS AND PATHWAYS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
<b>1</b>	<b>Develop 'niche'/boutique programmes aligned to NZ Inc. export priorities</b>	Develop programmes linked to export priorities and export businesses – premium product, premium price	■	■	■
		Ensure non-duplication of programmes – 'co-opetition'	■	■	■
		Collaborate with science and innovation sector to develop programmes	■	■	■
		Ensure responsive and timely accreditation of new niche qualifications	■	■	■
<b>2</b>	<b>Pre-enrolment to permanent migrant pathways</b>	Develop qualifications linked to INZ skill shortage priorities	■	■	■
		Ring-fence permanent residence visas for skill shortage areas / relevant vocational programmes	■		
		Ensure that programmes also support non-migrants	■		

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government



# PRODUCTS AND PATHWAYS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
3	Focus on developing excellence in distance education, blended learning and digital literacies	Groups of PTEs to develop high quality online feeder programmes with offshore institutions – setting up colleges offshore with licence arrangements	■	■	■
		Develop short taster programmes for New Zealand visitors to hook potential students	■	■	■
		Collaborate to develop best-practice online learning programmes and support arrangements, including with schools	■	■	■
4	Increase attractiveness of PTE programmes	Implement articulation agreements with New Zealand (and offshore) Universities and ITPs into degrees, to increase attractiveness of PTE programmes and ensure students stay in New Zealand for longer	■	■	
		Develop tailored programmes for individuals across a range of institutions, starting at school level	■	■	

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# RESOURCING OVERVIEW

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Investment in sector development requires quality educational and commercial practice, with a sound and sustainable return.

To achieve sustainable growth in the value of international education, high quality PTEs (individually, and in clusters with other PTEs, education providers and relevant export-focused business enterprises) will have access to capital and appropriate resources for investment in products, capability development and market development.

# STRATEGIC CHOICES — RESOURCING

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1

Support a NZ Inc. approach, with clusters of PTEs, other providers and export businesses

2

Invest in student experience to ensure 'hygiene factors' are improved

3

Invest in high quality PTEs for joined-up marketing and in-market activities

# RESOURCING

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
<b>1</b> Support a NZ Inc. approach, with clusters of PTEs, other providers and export businesses	ENZ to link with NZTE support programmes for businesses – PTEs eligible for NZTE support	Government	Government	Sector
	Develop clusters of PTEs, other education providers and exporting businesses within specific New Zealand’s internationally competitive industry sectors	Sector	Sector	Sector
	Ensure marketing resources and funding available	Sector	Sector	Sector
<b>2</b> Invest in student experience to ensure ‘hygiene factors’ are improved	Package ultra fast broadband offerings for homestay providers and international students	Government		
	Ensure that there is a continuous supply of accredited New Zealand quality-assured homestay providers	Sector	Sector	
	Develop hostel accommodation arrangements linked to hospitality qualifications / programmes	Sector	Sector	Sector
	Negotiate public transport discounts for international students with local and regional authorities	Sector	Sector	Sector
<b>3</b> Invest in high quality PTEs for joined-up marketing and in-market activities	Joint marketing and in-market activities across clusters of PTEs and other education providers	Sector	Sector	Sector
	Cluster and ENZ support focused on category 2 and category 1 PTEs only from 2015	Sector and Government	Sector and Government	Sector
	Cluster and ENZ support focused on Category 1 PTEs only from 2019	Sector	Sector and Government	Sector and Government

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# CAPABILITY AND LEADERSHIP OVERVIEW

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To support transformational growth, industry leadership will clearly define and articulate a vision and strategy for change.

We will share knowledge and experience across the industry and receive higher quality market intelligence while developing the ability to respond more effectively to opportunities in a planned and long-term manner.

# STRATEGIC CHOICES – CAPABILITY AND LEADERSHIP

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1

Ensure that entrepreneurial role models are supported to provide sector leadership

2

Collaborate across the education and business sectors to raise business skills and capability

3

Create and share relevant and timely market research and intelligence

4

Develop arrangements for business ownership succession planning



# CAPABILITY AND LEADERSHIP

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	<b>Ensure that entrepreneurial role models are supported to provide sector leadership</b>	Sector role models identified and supported to provide leadership to the PTE sector	■	■	■
		Develop online “how to” guidance for international education businesses	■	■	■
		Ensure effective sector wide advocacy at a national level	■	■	■
2	<b>Collaborate across the education and business sectors to raise business skills and capability</b>	Work with leaders in other education sectors, export businesses, NZTE and IoD to raise the level of business skills and knowledge of PTE owners and managers	■	■	
		Implement a networking and mentoring programme with leaders in other education and export sectors	■	■	

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# CAPABILITY AND LEADERSHIP

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
<b>3</b>	<b>Create and share relevant and timely market research and intelligence</b>	ENZ to work with NZTE and the education sector to provide regular detailed market analysis reports	■	■	■
		Support peak bodies and clusters of PTEs to provide regular analyses of market intelligence and data	■	■	■
		ENZ to implement international benchmarking of effective export education approaches	■	■	■
<b>4</b>	<b>Develop arrangements for business ownership succession planning</b>	Ensure NZQA policies support sector consolidation	■	■	
		Provide mentoring support for next generation of PTE owners, leaders and managers	■	■	
		Identify options for franchising of successful export education business models	■	■	

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# PARTNERSHIP OVERVIEW

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New Zealand is too small for PTE-specific activity. We must collaborate with each other, the rest of the education sector and exporting businesses to compete.

We must benefit from increased scale, capacity, and efficiencies by using a range of collaborative models between providers and relevant businesses; locally, regionally and nationally.

Our approach to the international marketplace will be as a joined up ‘NZ Inc.’ team, while still retaining our individual freedom and independence.

We work to increase New Zealand PTE international success by helping boost their global reach and build capability. We must use our connections and government influence on behalf of businesses, and apply local knowledge – from ENZ, NZTE and a network of providers and experts – to help PTEs enter and grow in international markets.

# STRATEGIC CHOICES — PARTNERSHIP

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**1**

Develop a stronger NZ Inc. approach for collaboration to achieve scale

**2**

Collaborate across groups of PTEs

**3**

Strengthen cohesion with the rest of the education sector and relevant export businesses

# PARTNERSHIP

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
<b>1</b> Develop a stronger NZ Inc. approach for collaboration to achieve scale	ENZ to work with NZTE and Tourism NZ – joined up activities and sharing market intelligence, and providing shared services and support to export PTEs	Government	Government	Government
	Build regional partnerships with schools, business and other TEOs to attract students to all parts of New Zealand	Sector	Sector	Government
	Ensure government agencies and their staff both onshore and offshore have a common and agreed understanding of the importance of international education	Sector	Sector	Government
	Trade missions to target countries to routinely include PTE representation	Government	Government	Government
	Collaborate with niche export businesses to develop internship opportunities for staff, students and graduates	Sector	Government	Government
<b>2</b> Collaborate across groups of PTEs	Undertake joint marketing initiatives offshore	Sector	Sector	
	Collaborate with other PTEs to develop planned new programmes based on New Zealand ‘strengths’ – avoid duplication	Sector		
	Implement shared services (marketing, applications, SMS) across groups of PTEs to reduce cost and improve efficiencies	Sector	Sector	

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

# PARTNERSHIP

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
<b>3</b> <b>Strengthen cohesion with the rest of the education sector and relevant export businesses</b>	Undertake joint market-specific promotions with ITPs, schools, Universities and businesses – shared market intelligence and reduced costs			
	Negotiate flexible entry criteria at multiple entry levels to degree programmes within other TEOs – articulation agreements with ITPs and Universities			
	Tailored pathways to ensure students stay longer in New Zealand			

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government



# PRIORITY CHOICES

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- Build on existing markets while also diversifying into new markets

Markets



- Make it easy for students to apply and enrol – a seamless experience

Markets



- Develop the full potential of personal relationships with our students, families and alumni

Markets



- Develop niche / boutique programmes aligned to NZ Inc. export priorities and national strengths

Products & Pathways



- Support a NZ Inc. approach, with clusters of PTEs, other providers and export businesses

Resourcing



- Ensure that entrepreneurial role models are supported to provide sector leadership

Markets



- Develop a stronger NZ Inc. approach for collaboration to achieve scale

Partnership



# SUPPORTING YOUR JOURNEY TO SUCCESS IN 2025...

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A roadmaps analogy was used throughout this process because it was always going to be about the journey *as well* as the destination. While these documents are final drafts, it's far from over. ENZ will support industry to start the journey by:

1. Working with providers, peak bodies, sector groups, regional bodies and other key stakeholders to widely communicate the sector and industry roadmaps and their key features.
2. Working with each sector to develop a joint work plan that will identify what the highest priority roadmap projects are and who (industry, ENZ, or jointly) will take responsibility for leading them.
3. Working with each sector to develop the detail of how each priority sector-focused project will be approached, what costs and benefits can be delivered, and when it can be delivered.
4. Facilitating the establishment of a cross-sector project steering group to lead a collaborative approach to high priority roadmap projects where they require a multi-sector or pan-industry approach, including the identification of best practice across sectors.
5. Working alongside each sector and the cross-sector project steering group to appropriately support the implementation of the agreed high priority roadmap projects for 2014/15.

# YOU'RE IN THE DRIVING SEAT NOW

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To create the kind of future mapped out in the roadmap we seek your commitment to starting the journey and leading the way by:

1. Working with your colleagues, stakeholders, other providers, and peak body or sector groups to widely communicate the sector and industry roadmaps and their key features.
2. Working with other providers in your sector to develop a joint work plan that will identify what the highest priority roadmap projects are and who (industry, ENZ, or jointly) will take responsibility for leading them.
3. Working with your sector to develop the detail of how each priority project will be approached, what costs and benefits can be delivered, and when it can be delivered.
4. Working alongside other providers in your sector to support the implementation of agreed high priority roadmap projects for 2014/15.
5. Adopting the changes in your School, institution or company that are part of making the journey to 2025.

**“Change will not come if we wait for some other person or some other time. We are the ones we’ve been waiting for. We are the change that we seek.”** Barack Obama

# ACKNOWLEDGEMENTS

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Neil Miller, Executive Director, Independent Tertiary Institutions

Craig Musson, Managing Director, National Trade Academy

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Interview Participants: ICL Business School, International Travel College, New Zealand Career College, Whitecliffe College of Arts and Design, Media Design School, Intuери Education Group, Corporate Academy Group, Newton College of Business and Technology, Chen Palmer, New Zealand Institute of Sport, Yoobee School of Design, National Trade Academy, Taylors College, Auckland Institute of Studies St Helens, Ames IT Academy, EDENZ Colleges, Cornell Institute of Business and Technology, New Zealand Tertiary College, New Zealand Management Academy, Pacific International Hotel Management School, Air New Zealand Aviation Institute, Queenstown Resort College, Independent Tertiary Education New Zealand, Independent Tertiary Institutions





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