



SCHOOL SECTOR STRATEGIC ROADMAP

Final Summary

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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

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 School 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.

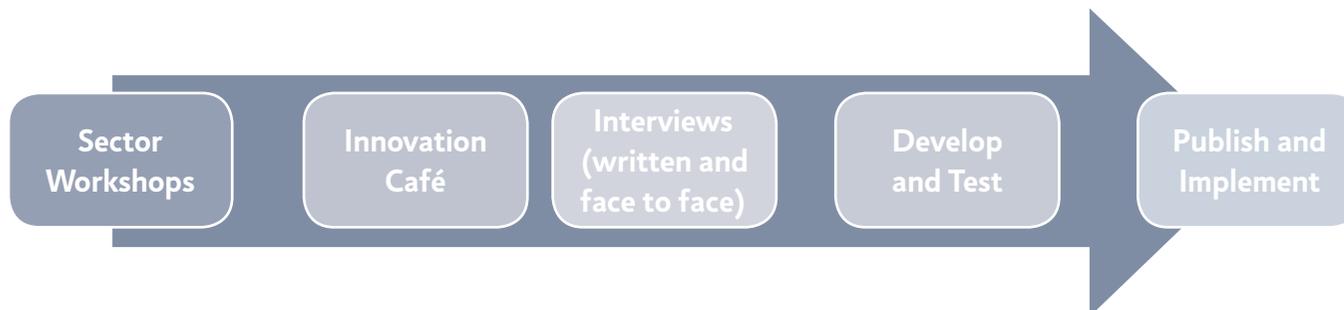
The process for developing an international education industry strategic roadmap commenced in early December 2013 and has involved a team of independent Project Managers working with key sector advisors and international education providers to produce a roadmap for their respective sectors via:

- > 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. School Sector Discussion Paper
2. School Sector Roadmap Workshop Outcomes & Key Themes
3. School Sector Interview Summary
4. Innovation Café Discussion Paper
5. Innovation Café Workshop Outcomes & Key Themes



PURPOSE

This roadmap has been developed by the school 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
PARTICIPATION	Number of international education providers*	594 283 (1°) 311 (2°)	636 307 (1°) 329 (2°)	699 352 (1°) 347 (2°)
ENROLMENT	Students**	16,720 2,337 (1°) 14,383 (2°)	23,471 2,964 (1°) 20,507 (2°)	27,923 3,531 (1°) 24,392 (2°)
	Average students per School	28 8 (1°) 46 (2°)	37 10 (1°) 62 (2°)	40 10 (1°) 70 (2°)
VALUE	Tuition fee income	\$122m	\$220m	\$262m
	Tuition fees per EFTS	\$4,440 \$7,767	\$5,684 \$9,896	\$5,684 \$9,896
	EVA***	\$359m	\$611m	\$726m

Current' data are sourced from MoE Export Education Levy Full Year 2013

* New Zealand Schools with at least one international student. ** Students includes full fee-paying, NZAID, exchange, onshore / offshore, short / long term students. *** Economic Value Added.

DESTINATION 2025

– THE NUMBERS EXPLAINED

Scenario 1 assumes:

- > An annual student growth rate of 2%-3% from 2013 (volume/value)
- > A compound annual fee increase of 2.0% from 2013
- > An inflation rate of 1.0%-2.0% from 2013
- > The EVA is the sum of tuition fee revenue and living costs per student
- > The 2012 “tuition per student” was sourced from the Economic Impact of International Education 2012/13 report (EVA). It is based on the total annual tuition income generated for that sector and divided by the number of students in that sector.
- > The 2012 living cost per student was sourced from the EVA. This value was derived from surveying students for 12 months and determining their annualised living cost while studying New Zealand. It included costs such as accommodation, utilities, books and other costs associated with living in New Zealand. Based on the results from the survey, an average living cost per student (in each sector) was estimated in the EVA.

Scenario 2 assumes:

- > An annual student growth rate of 3.5%-4.5% from 2013
- > A compound annual fee increase of 2.0% from 2013
- > An inflation rate of 1.0%-2.0% from 2013
- > The EVA is the sum of tuition fee revenue and living costs per student
- > The 2012 “tuition per student” was sourced from the Economic Impact of International Education 2012/13 report (EVA). It is based on the total annual tuition income generated for that sector and divided by the number of students in that sector.
- > The 2012 living cost per student was sourced from the EVA. This value was derived from surveying students for 12 months and determining their annualised living cost while studying New Zealand. It included costs such as accommodation, utilities, books and other costs associated with living in New Zealand. Based on the results from the survey, an average living cost per student (in each sector) was estimated in the EVA.

DESTINATION 2025

Destination 2025

Markets	<ul style="list-style-type: none"> > The New Zealand Schools brand is clearly understood and articulated widely by a diverse range of New Zealand offshore representatives. This is underpinned by a “Qualmark” that is regarded as the most important evidence of quality. > Targeted school growth has been achieved from both current core and diversified markets. > The New Zealand schools’ alumni and family networks function effectively to support marketing and are a significant source of new enrolments. > A network of offshore partner schools joins our agent network as the major sources of student enrolments. > Development of new programmes within schools is market-led in response to robust in-market research and relationship development. > School life in New Zealand is constantly on-show to the world via digital channels.
Products & Pathways	<ul style="list-style-type: none"> > There are 100% more students transitioning to New Zealand tertiary study from New Zealand schools. > NCEA is portable and prestigious with official recognition in all key markets. > New Zealand school qualifications are sought after for their innovative approach, flexibility, academic rigour and in opening doors to the world. > There are significant increases in entry from New Zealand schools to well ranked international universities. > The New Zealand school experience is characterised as “Family Friendly”. > There is more differentiation between school programmes consistent with the character and strengths of schools. > There is greater choice and flexibility in course delivery and pathways to tertiary. > New Zealand schools have a greater offshore presence, online preparatory courses and well defined pathways from offshore schools to New Zealand. > New Zealand schools are regarded as among the best in the world at developing student ability in English within a mainstream school programme.
Resourcing	<ul style="list-style-type: none"> > There is an established programme of growing school international income to a higher level through effective resourcing. > The New Zealand homestay network has an international reputation for quality assurance and consistency of standards. > Private interests and coordinated ventures are meeting demand for accommodation and other infrastructure demands. > International students and their families are more integrated into communities and receive a range of benefits and assistance to enable this.
Capability & Leadership	<ul style="list-style-type: none"> > School governance and leadership are well equipped to make sound educational and commercial decisions with regard to international education. > A professional body for school international education coordinates initiatives that enhance quality and economic growth across the sector. > School staff with international responsibilities have a nationally recognised professional development framework for career enhancement and succession planning. > New Zealand schools have proactively responded to timely and targeted market intelligence and using joint sector and government expertise, regularly secure contracts that supply large numbers of students to schools across the country.
Partnership	<ul style="list-style-type: none"> > New Zealand schools benefit from economies of scale through shared services, school and regional partnerships. > School international growth is a feature of our regions as well as the main centres. > Some schools collaborate for offshore ventures, perhaps including private partners. > Immigration policy and processes recognise the low-risk associated with school student visas and encourage growth in competitiveness. > The school sector works closely for mutual benefit with other international education sectors in product and market development.

INDUSTRY ROADMAP STRATEGIC THEMES

Markets

Products and
Pathways

Resourcing

Capability
and
Leadership

Partnership

MARKETS OVERVIEW

To achieve transformational economic growth, we will leverage both the New Zealand and schools brands, our quality in-market relationships and the full value of our alumni and business networks.

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

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

STRATEGIC CHOICES — MARKETS

1

Build on existing markets while also diversifying into new markets

2

Strengthen the position of New Zealand Schools as a quality brand

3

Develop a more effective and continuous presence offshore for schools

4

Grow institutional partnership channels with offshore schools

5

Develop greater consistency and depth in agent engagement and practices

6

Develop the full potential of personal relationships with our current families and alumni

7

Identify and develop products for market segment niches with high growth potential

8

Develop effective digital channels to tell the New Zealand school story

MARKETS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	Build on existing markets while also diversifying into new markets	Agree School Sector 10 year priorities, to include diversified markets (informed by market projections and sector strengths)	■	■	■
		Anticipate and respond to changes in airline connectedness and market environment	■	■	■
2	Strengthen the position of New Zealand Schools as a quality brand	Develop the 'New Zealand School Education Story', using our education research, results, NCEA brand and Code of Practice	■		
		Establish a New Zealand Schools 'Quality Code' and 'Qualmark' (with criteria for quality)	■	■	
3	Develop a more effective and continuous presence offshore for schools	Appoint in-market New Zealand school graduate ambassadors (alumni)	■	■	■
		Facilitate school focussed and timed promotional events	■	■	■
		Deliver professional development for offshore representatives	■	■	■

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

MARKETS

		DURATION (YEARS)		
STRATEGIC CHOICES	SPECIFIC ACTIONS	0 - 3	3 - 5	5 - 10
4 Grow institutional partnership channels with offshore schools	Establish New Zealand quality-assured school pathway programmes for offshore partner schools	■	■	
	Provide benefit / sponsorship packages for New Zealand partner schools	■	■	
5 Develop greater consistency and depth in agent engagement and practices	Align New Zealand school agent agreements	■	■	■
	Align New Zealand school commission policy	■	■	■
	Represent New Zealand schools in regular engagement with key agent organisations	■	■	■
	Design and implement new models for inbound engagement	■	■	■

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

MARKETS

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
6 Develop the full potential of personal relationships with our current families and alumni	Network in-market with current school families	■		
	Develop social networking family platforms	■		
	Appoint in-market New Zealand school graduate ambassadors (alumni)	■		
	Increase incentives for Kiwi students and teachers to experience part of their education overseas	■	■	
7 Identify and develop products for market segment niches with high growth potential	Conduct continuous in-market research and partner identification	■	■	■
	High-growth programme design and development is undertaken by schools to meet market demand	■	■	■
8 Develop effective digital channels to tell the New Zealand school story	Develop social networking family platforms	■		
	Students capture school life regularly on video	■		
	Resource video conference facilities for schools/clusters	■		

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

PRODUCTS AND PATHWAYS OVERVIEW

To achieve transformational economic growth, high quality, niche education products will continue to be developed that meet the future needs of global students in fields where we have competitive advantage.

Delivery will be more diversified, including the use of offshore and blended learning.

We will strengthen pathways within our education system, to tertiary education, employment and residency.

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

STRATEGIC CHOICES – PRODUCTS AND PATHWAYS

1

Develop and promote pathways that include New Zealand schools

2

Diversify school products in response to market demand

3

Enhance the quality of school and family experience – ‘family friendly New Zealand’

4

Establish New Zealand school programmes offshore

5

Enhance provision of ESOL to support pathways

6

Develop and position NCEA as an international qualification

PRODUCTS AND PATHWAYS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	Develop and promote pathways that include New Zealand schools	Design and implement an "Entry Guarantee" to New Zealand tertiary education from New Zealand Schools	■	■	■
		Enhance career and course planning tools, including tertiary internships	■	■	■
		Recognise flexible entry criteria at multiple entry levels to degree programmes	■	■	■
		Strengthen school preparation programmes for offshore universities	■	■	■
		Strengthen recognition and incentives for primary to secondary pathways within local areas	■	■	■
2	Diversify school products in response to market demand	Package niche courses for school mainstream or supplementary (after-school) study	■		
		Expand international qualification provision	■	■	
		Commercialise short-term group programmes (students, parents or teachers)	■		
		Establish programmes delivered by multiple schools	■		
3	Enhance the quality of school and family experience – 'family friendly New Zealand'	Amend Immigration policy for family flexibility	■	■	■
		Provide incentives for study by multiple family members across providers and sectors	■	■	■
		Strengthen community integration and support programmes	■	■	■

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

PRODUCTS AND PATHWAYS

		DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
4	Establish New Zealand school programmes offshore			
	Develop standard online pre/post arrival programmes and resources for schools	■		
	Establish New Zealand quality-assured school pathway programmes for offshore partner schools	■	■	
5	Enhance provision of ESOL to support pathways			
	Establish showcase international schools in key market locations to model New Zealand pedagogy and curriculum	■	■	■
	Strengthen resources for English assessment at entry and develop capability, or partners, for English preparation	■	■	■
	Define best practice and strengthen ESOL support with consistent monitoring and reporting of English progression	■	■	■
6	Develop and position NCEA as an international qualification			
	Recognise alternative English standards for tertiary admission including international qualifications	■	■	■
	Establish formal equivalency with local and international qualifications within all major markets	■	■	
	Develop an NCEA brand awareness campaign using testimonials to complement branding for New Zealand schools	■	■	
	Develop and award high school and primary school completion (graduation) certificates	■		
Further develop the New Zealand Scholarship examinations for elite international students	■			

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

RESOURCING OVERVIEW

To achieve transformational economic growth, capable school sector providers (individually or in clusters) will have access to capital for investment in product, infrastructure and market development.

Investment in sector development will require quality educational and commercial practice with a sound and sustainable return.

Where appropriate, partnerships between public and private sector partners will be encouraged to increase scale.

STRATEGIC CHOICES — RESOURCING

1

Invest resources for capable providers and clusters to achieve step change in activity

2

Invest in accommodation infrastructure

3

Improve community awareness and infrastructure

RESOURCING

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	Invest resources for capable providers and clusters to achieve step change in activity	Invest in staffing resources for school growth initiatives	■	■	■
		Source property and infrastructure support for growth initiatives	■	■	■
2	Invest in accommodation infrastructure	Establish a New Zealand quality-assured homestay network	■	■	
		Form partnerships to establish additional school accommodation capacity	■	■	■
3	Improve community awareness and infrastructure	Build a community awareness programme promoting the benefits of international education and establishing a supportive infrastructure	■	■	■

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

CAPABILITY AND LEADERSHIP OVERVIEW

To achieve transformational economic growth, school sector leadership will clearly define and articulate a vision and strategy for change.

There will be investment in recruitment and professional development to engage an increased level of commercial expertise and to provide for career pathways and succession.

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.

STRATEGIC CHOICES – CAPABILITY AND LEADERSHIP

1

Increase engagement by Boards of Trustees with school international education growth

2

Support school leaders to invest in growth and work collaboratively, with a more commercial approach

3

Increase the ability of schools to coordinate change and drive quality

4

Increase business capability, professionalism and succession planning within the school sector and Government

5

Develop more agile and commercial response capability

CAPABILITY AND LEADERSHIP

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	Increase engagement by Boards of Trustees with school international education growth	Design and implement Board of Trustees “internationalisation” training and resources	Government		
		Model the establishment of BOT International business advisory groups	Government		
		Conduct sector-wide financial benchmarking to enable BOTs to make informed commercial decisions	Government	Government	
2	Support school leaders to invest in growth and work collaboratively, with a more commercial approach	Increase school leadership capability for international growth within school clusters	Government		
		Initiate a networking and mentoring programme with leaders from other export sectors	Government		
		Add an international component to the Aspiring/New Principal training	Government	Government	
3	Increase the ability of schools to coordinate change and drive quality	Establish a peak body for school international education with a focus on change leadership, raising quality standards and advocacy for the school sector	Government	Government	Government

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

CAPABILITY AND LEADERSHIP

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
4	Increase business capability, professionalism and succession planning within the school sector and Government	Develop resources and support for teaching staff to extend their capability in meeting the needs of international students and internationalisation of schools			
		Define a professional development framework and career pathway / structure for educators, international managers and administrators, including RPL for qualifications			
5	Develop more agile and commercial response capability	Produce timely and relevant market intelligence specific to the school sector			
		Develop joint school sector / Government expertise to identify, evaluate and respond to wholesale opportunities			

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

PARTNERSHIP OVERVIEW

To achieve transformational economic growth, we will deliver a greater level of cohesiveness within the sector and with government and private sector partners.

We will benefit from increased scale, capacity, and efficiencies by using a range of collaborative models between providers; 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.

STRATEGIC CHOICES — PARTNERSHIP

1

Develop business models for collaboration by schools, regions and related industry partners

2

Strengthen NZ Inc. partnership with the school sector

3

Strengthen cohesion with other international education sector

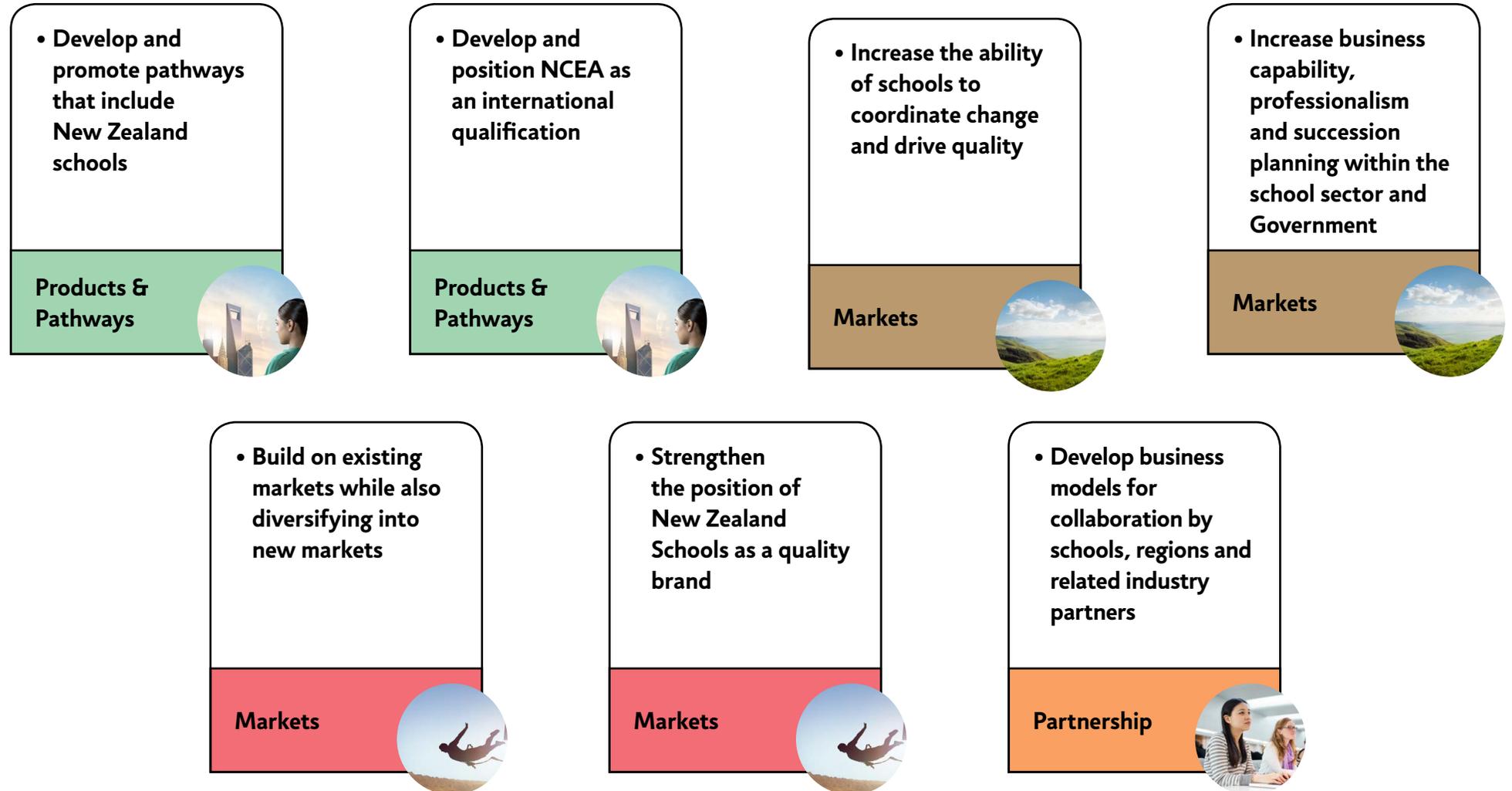
PARTNERSHIP

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
1 Develop business models for collaboration by schools, regions and related industry partners	Achieve business efficiencies through standard systems for enquiries, enrolment, fees, agent agreements	Light Orange	Orange	Orange
	Develop a toolkit for collaborative project management	Dark Grey	Dark Grey	Orange
	Appoint international education business mentors and collaboration brokers	Dark Grey	Orange	Orange
	Expand partnerships with tourism operators	Light Orange	Orange	Orange
2 Strengthen NZ Inc. partnership with the school sector	Agree a New Zealand Schools strategy with government	Dark Grey		
	Prepare collateral for the New Zealand schools value proposition for use by all offshore delegations	Dark Grey		
	Streamline Immigration processes for the low-risk school sector	Dark Blue		
3 Strengthen cohesion with other international education sectors	Undertake joint market specific promotions with other sectors	Light Orange	Orange	Orange
	Recognise flexible entry criteria at multiple entry levels to tertiary programmes	Light Orange	Orange	Orange
	Participate in joint initiatives to strengthen cohesion and remove barriers within student pathways	Dark Grey	Orange	Orange

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

PRIORITY CHOICES



SUPPORTING YOUR JOURNEY TO SUCCESS IN 2025...

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

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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Project Manager: Greg Scott, Middleton Grange School

Advisory Committee: Annemarie Biggs, Glendowie Primary School

Jennifer Kirkham, Botany Downs Secondary College

Scott Haines, Motueka High School

Suze Strowger, Ministry of Education

Interview Participants: Academic Colleges Group, Rangitoto College, Takapuna Grammar School, Motueka High School, Glendowie Primary School, Somerville Intermediate, Macleans College, Onehunga High School, Waiuku College, St Paul's Collegiate School, Kristin School, John Paul College, Queen Charlotte College, Waimea College, Southland Girls' High School, Chisnalwood Intermediate, Burnside High School, Ilam School, Greenpark School, Waihopai Primary School, Botany Downs Secondary College, Scots College, Queen Margaret College, Kirkwood Intermediate School, Kaikorai Valley College, Kavanagh College, Bethlehem College, Otumoetai Intermediate, Wellington East Girls' College, Riccarton High School, James Hargest High School, Venture Southland, NZ Secondary Principals' Council (NZSPC), John Morris, NZ Association of Intermediate and Middle Schools, NZ Principals Federation, NZ Ministry of Education International Division



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