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# UNIVERSITY 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

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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 University 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. University Sector Discussion Paper
2. University Sector Roadmap Workshop Outcomes & Key Themes
3. University 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 University 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	8	8	8
<b>ENROLMENT</b>	Number of onshore international students	23,884	30,007	35,550
	Average students per University	2,986	3,751	4,444
<b>VALUE</b>	Tuition fee income	\$376m	\$635m	\$752m
	Tuition fees per student	\$15,746	\$21,162	\$21,162
	EVA	\$963m	\$1,534m	\$1,818m

# DESTINATION 2025

## — THE NUMBERS EXPLAINED

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- > ‘2025 Scenario 1’ is calculated on a projected 69% growth in total value. This was the average of the growth estimates that roadmap interviewees provided for their individual institutions. ‘2025 Scenario 2’ is based on the Leadership Statement target of 100% growth in total value;
- > The ‘Number of onshore international students’ figure in the ‘Current’ Column is the actual figure for 2013 sourced from the Ministry of Education. It includes: full-fee paying students; PhDs; exchange students; foreign research postgraduate students; and NZAID students. It does not include offshore students;
- > The ‘Tuition fee income’ figure in the ‘Current’ column is the actual figure for 2013 from the Ministry of Education;
- > The ‘EVA’ or ‘Economic Value-Add’ figure in the ‘Current’ column was derived from surveying students in 2012 and determining their annualised living costs while studying in New Zealand. It included costs such as accommodation, communications, grocery costs, domestic transport and travel, recreational goods and services, and utilities;
- > Tuition fees in 2025 were conservatively estimated on the basis of a 6% actual fee increase in 2014, estimated 3% increases for 2015 and 2016, and estimated 2% increases thereafter;
- > EVA income per student in 2025 was conservatively estimated by applying 1.15% compound inflation adjustments for 2014-16, 1.5% adjustments for 2017-19 , and 2% adjustments thereafter;
- > The calculations for the two 2025 scenarios were based on applying the respective 69% and 100% growth rates to the Current ‘Tuition fee income’ figure;
- > The number of international students for each 2025 scenario was then calculated by dividing the target tuition fee incomes by the estimated tuition fees;
- > The number of students was then multiplied by the adjusted EVA estimate to produce the EVA income figures.

# DESTINATION 2025

	Current	Destination 2025
<b>Markets</b>	<ul style="list-style-type: none"> <li>&gt; Dominance of China as source</li> <li>&gt; Dominance of Auckland as destination</li> <li>&gt; Use of offshore agents &amp; social media</li> <li>&gt; Attendance at fairs and expos</li> <li>&gt; Twinning/articulation agreements</li> <li>&gt; Increased competition</li> </ul>	<ul style="list-style-type: none"> <li>&gt; A strong New Zealand universities story</li> <li>&gt; Individual but complementary New Zealand brands</li> <li>&gt; More diversified markets</li> <li>&gt; Greater use of alumni as ambassadors</li> <li>&gt; Expanded Study Abroad and scholarship markets</li> <li>&gt; More students from offshore and onshore pipelines</li> </ul>
<b>Products &amp; Pathways</b>	<ul style="list-style-type: none"> <li>&gt; All 8 universities in QS top 500</li> <li>&gt; New Zealand outperforms ISB benchmark for learning experience &amp; student support</li> <li>&gt; Taught 180 pt Masters introduced</li> <li>&gt; PhDs</li> <li>&gt; Study Abroad</li> <li>&gt; Some students through onshore pathways</li> <li>&gt; Limited offshore delivery (and few enablers)</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Ongoing student-centred teaching and support in quality institutions</li> <li>&gt; Courses in global demand</li> <li>&gt; Courses that can best be studied in New Zealand</li> <li>&gt; Blended online/on-campus delivery</li> <li>&gt; Enhanced study experiences</li> <li>&gt; Work-ready graduates</li> </ul>
<b>Resourcing</b>	<ul style="list-style-type: none"> <li>&gt; Limited institutional financial capacity to undertake offshore delivery</li> <li>&gt; Institutions and government invest in market development</li> </ul>	<ul style="list-style-type: none"> <li>&gt; More freedom to deploy balance sheets</li> <li>&gt; New funds for targeted initiatives</li> </ul>
<b>Capability &amp; Leadership</b>	<ul style="list-style-type: none"> <li>&gt; Limited community understanding of the value of international students</li> <li>&gt; Fragmented entry processes</li> </ul>	<ul style="list-style-type: none"> <li>&gt; International students are celebrated</li> <li>&gt; International education becomes professionalised</li> <li>&gt; Streamlined entry processes</li> </ul>
<b>Partnership</b>	<ul style="list-style-type: none"> <li>&gt; Government agencies vary in their support for the 2025 goals</li> <li>&gt; Few offshore teaching collaborations between New Zealand universities</li> </ul>	<ul style="list-style-type: none"> <li>&gt; More agencies embrace the 2025 goals</li> <li>&gt; Increased offshore partnerships</li> <li>&gt; Enhanced regional strategies</li> <li>&gt; Increased engagement with employers</li> </ul>

# INDUSTRY ROADMAP STRATEGIC THEMES

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Markets

Products and  
Pathways

Resourcing

Capability  
and  
Leadership

Partnership

# MARKETS OVERVIEW

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To achieve transformational economic growth, we will leverage the New Zealand country brand, our high quality in-market relationships and the full value of our institutional, academic, alumni and government networks.

We will tell the New Zealand university story to larger audiences in selected markets.

We will develop market intelligence to better understand trends and new channels to reach our audiences.

# STRATEGIC CHOICES — MARKETS

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1

Develop a New Zealand universities' story to promote the main assets of our system

2

Use offshore alumni as New Zealand education ambassadors

3

Partner with offshore institutions to create a pipeline of students to New Zealand

4

Improve engagement with and effective use of agents

5

Maximise the recruitment potential of scholarships

6

Develop tailored and comprehensive approaches to different markets

7

Create and share relevant and timely market research and intelligence

# MARKETS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	Develop a New Zealand universities' story to promote the main benefits of our system	Develop a strong New Zealand universities story aligned to the New Zealand Education story that highlights the collective attributes and competitive advantages of our university system	■	■	■
		Promote institutional and city brands within that collective story and adapt that story to different markets	■	■	■
2	Use offshore alumni as New Zealand education ambassadors	Research and track the international success of alumni so as to document the value of New Zealand degrees	■		
		Tell emotional/hero stories about well-known offshore expatriate and international alumni to publicise the value of those degrees	■		
3	Partner with offshore institutions to create a pipeline of students to New Zealand	Develop more articulation / twinning / foundation / joint degree and study abroad relationships with educational, government and commercial partners to capture the opportunities that emerge as institutions and systems strengthen	■	■	■
		Create an assessment capability and resource database in ENZ to support institutions in doing due diligence on prospective partners	■	■	■
4	Improve engagement with and effective use of agents	Create a code of practice for onshore and offshore agents sending students to New Zealand and for institutions engaging with those agents	■		
		Survey agents annually to understand the features of our system that are easiest and hardest to sell	■		

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# MARKETS

STRATEGIC CHOICES		SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
5	Maximise the recruitment potential of scholarships	Offer more individual university scholarships to international students	■	■	■
		Market PhD domestic fees as akin to scholarships to highlight the very low cost of those degrees	■	■	■
		Lobby foreign scholarship providers about their rules and processes, so they send more students to New Zealand	■	■	■
6	Develop tailored and comprehensive approaches to different markets	Develop and implement strategies for current priority markets: China; India; Indonesia; the rest of ASEAN; and developed university systems (Europe, North America and North Asia)	■		
		Target other opportunities where New Zealand is known in or beyond education, where scholarships focus on subject rankings, where national priorities match New Zealand university strengths, or where institutions identify prospects	■		
		Use ENZ as an initial recruitment channel in emerging markets	■		
		Nurture broad and reciprocal government-to-government ties where such ties unlock student flows	■		
7	Create and share relevant and timely market research and intelligence	Produce regular reports on significant market opportunities and competitor behaviour to inform product development and mitigating actions	■	■	■
		Produce annual reports on emerging university systems (Latin America, the Middle East, Africa, Eastern Europe) to inform long-term engagement strategies	■	■	■

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

# PRODUCTS AND PATHWAYS OVERVIEW

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We will educate global citizens and achieve transformational economic growth by delivering quality courses in fields of high demand or where we have competitive advantage.

Delivery will be more diversified, and include the use of digital technologies and distance learning.

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

Concurrently, the quality of student experiences and learning support will be enhanced.

# STRATEGIC CHOICES – PRODUCTS AND PATHWAYS

---

1

Align product development to customer needs

2

Develop niche courses and programmes that align with New Zealand's unique attributes and market needs

3

Ensure course content prepares students for work in the global marketplace

4

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

5

Strengthen pathways across New Zealand's education system

6

Time course commencement to better align with northern hemisphere calendars

7

Develop and package New Zealand study experiences

8

Focus on preparing students for success in their chosen study and career

# PRODUCTS AND PATHWAYS

		DURATION (YEARS)		
STRATEGIC CHOICES	SPECIFIC ACTIONS	0 - 3	3 - 5	5 - 10
<b>1</b> Align product development to customer needs	Identify and market courses, degrees and products that are in demand internationally	■	■	■
	Produce annual research on global prices for these programmes to inform fees decisions	■	■	■
	Offer qualifications across more than one institution to capitalise on expertise across our system	■	■	■
<b>2</b> Develop niche courses and programmes that align with New Zealand's unique attributes and market needs	Offer focussed/interdisciplinary qualifications in fields in which New Zealand is academically renowned, publicly identified or geographically advantaged	■		
	Develop products with migration potential to connect recruitment with labour market demand	■		
<b>3</b> Ensure course content prepares students for work in the global marketplace	Review CUAP processes to ensure swift approval of courses likely to attract international students while maintaining system quality	■	■	■
	Develop guidelines for course and programme reviews that encourage content relevant to international and domestic students	■	■	■
<b>4</b> Focus on developing excellence in distance education, blended learning and digital delivery	Produce annual reports on evolving educational technologies and their impact on recruitment and educational experiences	■		
	Develop distance and blended courses that act as tasters for/provide pathways to onshore qualifications	■		

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# PRODUCTS AND PATHWAYS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
5	Strengthen pathways across New Zealand's education system	Develop clearly articulated and coherent pathways into undergraduate and postgraduate study			
		Prepare toolkits for schools and PTEs to encourage those pathways			
6	Time course commencement to better align with northern hemisphere calendars	Offer more niche, short or Study Abroad courses in months that align with global demand			
		Begin more programmes and courses in either semester, so students do not have to wait months to begin			
7	Develop and package New Zealand study experiences	Negotiate deals with airlines, banks, and tourism, transport or telecommunications companies to reduce costs beyond the classroom and expand extra-curricular experiences			
		Offer pre-departure in-country induction programmes to prepare students for study in New Zealand			
8	Focus on preparing students for success in their chosen study and career	Increase support around English language, internships and academic literacies, so students leave with better English than when they arrived and are attractive to employers			
		Prepare students to be global citizens through identifying and resourcing initiatives that increase the internationalisation of curricula, the interaction of international and domestic students, and the employability of graduates			

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# RESOURCING OVERVIEW

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To achieve transformational economic growth, institutions will have access to capital for product, infrastructure and market development.

Institutions will have incentives to partner and grow international revenues.

The long term commercial returns from international education will be sound and sustainable.

# STRATEGIC CHOICES — RESOURCING

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**1**

Enable better access to capital and R&D for international growth and risk sharing

**2**

Align investment with capability, quality and reputation enhancement

**3**

Collaborate for offshore projects

# RESOURCING

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	Enable better access to capital and R&D for international growth and risk sharing	Allow universities more flexibility in deploying their balance sheets so they are more able to finance and assume the risks involved in international education growth initiatives	■	■	■
		Provide a pool of capital / co-investment fund to provide an alternative to develop international initiatives that do not rely solely on university balance sheets for risky but high value projects	■	■	■
		Propose candidates with international education expertise for Council positions	■		
2	Align investment with capability, quality and reputation enhancement	Form strategic relationships with ranking agencies and conduct sophisticated analyses of their tables	■		
		Provide additional targeted funding for those disciplines and activities (e.g. joint international research projects) that will allow the sector to best maintain / lift its international rankings	■	■	■
3	Collaborate for offshore projects	Identify and broker opportunities for New Zealand universities to collaborate in offshore delivery	■	■	■
		Invest in digital facilities and resources to showcase New Zealand teaching in MOOCs	■	■	■
		Develop toolkits around delivery of offshore services in priority markets	■	■	■
		Interested New Zealand universities develop a commercial entity to jointly deliver projects offshore	■	■	■

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# CAPABILITY AND LEADERSHIP OVERVIEW

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To achieve transformational economic growth, we will build greater staff, student and public understanding of the benefits of international education and our responsibilities to international students.

There will be investment in professional development and networks to improve our processes, teaching and pastoral care.

We will share knowledge, channels and resources to increase our conversion of enquiries to enrolments.

# STRATEGIC CHOICES – CAPABILITY AND LEADERSHIP

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1

Market the value of  
international students to  
New Zealanders

2

Optimise recruitment and  
admissions policy / processes  
across the sector

3

Professionalise the sector

# CAPABILITY AND LEADERSHIP

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
<b>1</b> Market the value of international students to New Zealanders	Develop a campaign to market the value of international students to New Zealanders to show students, employers, academics, media and the public their social, cultural and pedagogical importance and to dispel the notion that they displace local students.	■	■	■
	Provide incentives to academics to encourage them to support international students, foster collaborations between international and domestic students, and consider international student demand in course and programme design	■	■	■
<b>2</b> Optimise recruitment and admissions policy / processes across the sector	Review sector-wide admissions processes and establish a sector-owned best practice approach around converting enquiries into enrolments	■		
	Extend the existing framework for recognition of offshore qualifications	■		
	Pilot an offshore foundation programme that provides students with entry into Stage I or II courses	■	■	
<b>3</b> Professionalise the sector	Offer regular professional development courses to international education administrators	■	■	■
	Provide opportunities for admissions staff to visit priority markets	■	■	■

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# PARTNERSHIP OVERVIEW

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To achieve transformational economic growth, we will ask more government agencies to focus on the 2025 goals.

We will approach international markets in clusters or as a joined up NZ Inc. team – while retaining our individual freedom and independence.

We will partner with overseas institutions in sustainable, purposeful and mutually beneficial relationships.

We will benefit from increased scale, capacity and efficiencies by working with regions and the private sector on offshore initiatives.

# STRATEGIC CHOICES — PARTNERSHIP

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**1**

Increase collaboration and integration within and between industry and government

**2**

Develop stronger collaborative approaches between institutions to achieve scale

**3**

Increase engagement with New Zealand and offshore employers

**4**

Develop business models for collaboration with regions and related industry partners

# PARTNERSHIP

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
<b>1</b> Increase collaboration and integration within and between industry and government	Ensure government agencies and their staff both onshore and offshore have a common and agreed understanding of the importance of international education	Government	Sector and Government	Sector and Government
	Align operational policies around immigration and other settings to effectively support international education growth	Government	Government	Sector and Government
	Include international education in the KPIs of MFAT and NZTE officials in selected posts lacking ENZ staff so opportunities are not missed	Government	Sector and Government	Sector and Government
<b>2</b> Develop stronger collaborative approaches between institutions to achieve scale	Collaborate with other New Zealand universities around physical presence in key offshore markets	Sector		
	Develop deep and purposeful partnerships with high quality offshore institutions	Sector		

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

# PARTNERSHIP

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
<b>3</b> Increase engagement with New Zealand and offshore employers	Encourage New Zealand employers to take on international students as employees or interns	Government	Sector	Sector
	Monitor student and post-study work rights to ensure they remain internationally competitive	Government	Sector	Sector
	Bring offshore employers over to meet New Zealand graduates, and engage systematically with inbound business delegations	Government	Sector	Sector
	Liaise with professional bodies to ensure the portability of New Zealand qualifications	Government	Sector	Sector
<b>4</b> Develop business models for collaboration with regions and related industry partners	Work with local government organisations to develop and resource regional and multi-regional strategies to attract international students	Government	Government	
	Lobby the tourism industry and airline companies to offer packages and routes that support recruitment	Government	Government	

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

# PRIORITY CHOICES

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- Develop a New Zealand universities' story to promote the main benefits of our system

Markets



- Use offshore alumni as New Zealand education ambassadors

Markets



- Enable better access to capital and R&D for international growth and risk sharing

Resourcing



- Collaborate for offshore projects

Resourcing



- Market the value of international students to New Zealanders

Markets



- Optimise recruitment and admissions policy / processes across the sector

Markets



- Increase collaboration and integration within and between industry and government

Partnership



- Create and share relevant and timely market research and intelligence

Markets



# 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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Programme Manager: Alasdair MacLeod, Growth Solutionz

Project Manager: Dr Matthew O’Meagher, Cientiros Limited

Advisory Committee: Jenny Dixon, Deputy Vice Chancellor, University of Auckland

Bob Korzeniowski, Director, University of Canterbury

Derek McCormack, Vice Chancellor, Auckland University of Technology

Rob Rabel, Pro-Vice Chancellor, Victoria University of Wellington

Ed Weymes, Pro-Vice Chancellor, University of Waikato

Interview Participants: University of Auckland, Auckland University of Technology, University of Waikato, Massey University, Universities New Zealand, Victoria University of Wellington, University of Canterbury, University of Canterbury International College, Lincoln University, University of Otago

# ThinkNew<sup>™</sup>



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