

Education New Zealand Quarterly Report – Quarter One

1 July to 30 September 2024





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1. Executive Summary

ENZ has made good progress towards its strategic goals in the first quarter of the 2024-25. ENZ has demonstrated strong performance in growing international student numbers (Goal 1), with total enrolments reaching 65,705, a 9% increase from the previous year. This growth is evident across universities, PTEs, and Te Pūkenga, indicating a robust recovery in the sector. ENZ's global brand campaign, "Learn New Every Day," and targeted engagements in key markets like China, Thailand, and Germany have contributed to increased awareness and consideration of New Zealand as a study destination.

In line with Goal 2 (Partner and connect), ENZ has strengthened international partnerships through high-level engagements, including the Prime Minister's trade delegation to Malaysia and South Korea, participation in the European Association for International Education (EAIE) Conference, and hosting the University of Toronto's "Indigenous House" for cultural exchange. These initiatives have enhanced New Zealand's educational ties globally and fostered valuable connections with international institutions and stakeholders.

Supporting sector capability development (Goal 3) remains a priority, as evidenced by the successful New Zealand International Education Conference (NZIEC) KI TUA 2024, which brought together 449 delegates and achieved an 86% satisfaction rate. ENZ has also made strides in optimizing its operations (Goal 4) by refreshing its Code of Conduct and enhancing its risk management framework.

ENZ's financial performance for the first quarter of 2024-25 shows minor timing-related variances to the budgeted year-to-date position. Its expenditure is tracking slightly under budget, with the Manaaki Scholarship programme expenditure under the year-to-date budget, attributed to underspend in both Manaaki Scholarships Expenditure and Manaaki Operations and Future State Project.

2. Performance Measure Highlights



Measures at risk of not being achieved

No non-financial performance measures are current at risk of not being achieved for 2024-25

3. Sector Outlook

Global

- Australia announced a 270,000 cap on new overseas student commencements for 2025

- Canada restricted post-graduate work permit applications at the US border to prevent visa processing bypasses
- The UK saw increasing interest from Nepal as a source market for international students
- Germany reduced visa processing times to 2 weeks for skilled Indian applicants

Domestic

- Universities warned of funding challenges and potential "catastrophic consequences"
- **S 6 (a)**
- Positive media coverage of NZ's ranking in university sustainability and creative thinking
- Te Pūkenga faces restructuring and funding uncertainties

4. Operational Highlights

Goal 1 - Grow international student numbers

International student enrolments

Based on the ENZ monthly operational reports, MOE data for Terms 1 and 2 of 2024 shows significant growth in international student enrolments in New Zealand:

- Total enrolments: **65,705** in 2024, up from 60,247 in 2023 (**9% increase**)
- Sector growth: Universities, PTEs, and Te Pūkenga all show substantial improvements
- Term 2, 2024 enrolments already surpass entire 2023 academic year figures

This indicates an improving performance for education providers in New Zealand. This may also lead to a potential increase in economic contributions from the international education sector. Additionally, it continues demonstrates the sector's resilience in the face of global challenges.

Visa Applications

In September 2024, 3,761 student **visa approvals** were granted.

- Visa decline rate reached 23% in September 2024; matching July's high. Year-to-date approval rate: 81%.
- Highest decline rates: Te Pūkenga/NZIST Network (34%), PTEs (35%). Lower for universities (16%) and schools (3%).
- **S 6 (a)**

S5 Valid Student Visa Holders

- 46,109 student **visa holders** in early October 2024, up 3% from September, aligning with 2019 and 2023 patterns.
- October 2024 student **visa holders** at 76% of October 2019 levels (60,433).
- 47% of student **visa holders** at universities (21,830), mostly at University of Auckland (7,761).
- India: 51% increase from October 2023. China: 12% growth, remains largest market (32%). China and India combined: 50% of all visa holders.

Global Brand Campaign - Learn New Every Day

The "Learn New Every Day" campaign, launched in November 2023, continued to run in China, India, South Korea, Thailand, Vietnam, and Japan. The campaign targets students and their parents. The key deliverables included:

- Campaign ran across multiple digital channels in target markets
- Focused messaging on New Zealand's unique educational offerings and experiences
- Engaged prospective students and their parents through targeted content

This campaign contributes to increasing awareness and consideration of New Zealand as a study destination among key target audiences which is important for attracting more international students and growing enrolment numbers.

Growing Awareness through Strategic Media Engagement in China

ENZ collaborated with Chinese influencer Miki Zhou to promote studying in New Zealand. The key achievements include:

- Miki Zhou, an education influencer with 450,000 followers on Chinese social media, specializes in international education.
- Zhou's WeChat article "Why I Chose to Bring My Child to Study in New Zealand" garnered 10,866 views, exceeding ENZ's target.
- A subsequent livestream, "Education Without Anxiety: How New Zealand's Education System Helps Every Child Find Their Path," attracted 2,246 views and 13,151 engagements.
- The collaboration resulted in a dedicated WeChat group for 80 individuals interested in studying in New Zealand.

The targeted approach in China, increases awareness and engagement among key demographics, which can translate into higher student numbers from this major source country.

China Media Famil Outcomes - Interim Report

The China Media Famil in May 2024 featured two senior journalists and one key opinion leader (KOL). The key deliverables were :

- One published media story and video, with more content expected by December 2024
- Featured article in Jiemian: "*Special Report: I'm a kindergarten teacher in New Zealand*"
- Article reached 192,000 views on Jiemian's platforms and 6,592 views on WeChat
- Reposted by 43 Chinese media outlets, including major platforms
- Achieved "top post" status on WeChat

ENZ plans to release a comprehensive report on the China Media Famil outcomes in December 2024. The initiative has successfully generated positive coverage about New Zealand education in Chinese media, particularly highlighting early childhood education. High engagement levels indicate increased awareness about studying in New Zealand among Chinese audiences.

Greater visibility and positive coverage in Chinese media supports brand awareness, which can lead to increased interest and ultimately higher student numbers from China.

General International Education Events and Engagements

In September and October 2024, ENZ participated in several significant international education events and engagements. These included the National Association for College Admission Counselling (NACAC) conference in Los Angeles, the European Association for International Education (EAIE) Conference in Toulouse, an agent workshop in Rome, the Elevate Paris student recruitment fair, and the Can-Achieve International Education Conference in Hangzhou, China.

These events provided valuable opportunities for ENZ and New Zealand education providers to promote the country as a study destination, engage with key stakeholders, and strengthen international partnerships.

IDP Consultants Webinar

As part of New Zealand Week in early October, ENZ presented a webinar to 150 IDP consultants from Australia, Philippines, Vietnam, and India, focusing on promoting New Zealand as an education destination and showcasing agent resources, with the aim of increasing IDP-sourced students from 2,000 to 4,000.



Student Activities

German High School Students Arriving in New Zealand:

A farewell event for German students studying in New Zealand was held in Frankfurt. ENZ and the New Zealand Ambassador to Germany attended the event, which was organized by Study Nelson for students from the Nelson-Marlborough region.

In 2023, German students accounted for 1,417 (10%) of international students in New Zealand schools. Germany stands as the top European source and fourth globally for New Zealand high schools.

This demonstrates a strong interest from Germany, and boosts New Zealand's appeal to German students potentially increasing international student numbers,

Education Fair in Thailand

The New Zealand Education Fair was held on August 31, 2024 and saw participation from 60 New Zealand education providers. In total, 1,460 visitors attended the student fair, from 2,444 pre-registrations, demonstrating significant interest in New Zealand's educational offerings. 84% of sector representatives surveyed reported they were either satisfied or extremely satisfied with their experience of the fair.

The Bangkok student fair received a net promoter score of 69.23 from surveyed sector representatives. The main significance of this event was the large number of students heading to NZ - 82 in total.

The student fair in Thailand contributed to ENZ's goal of increasing international student numbers by successfully raising New Zealand's profile as a study destination and facilitated connections with potential students.

- 58% of students that attended the fair indicated their awareness increased after attending the fair.
- 50% of students that attended the fair indicated their preference increased after attending the fair.
- 71% of provider respondents indicated that they were somewhat/extremely satisfied with the quality of student leads secured.

These efforts demonstrate ENZ's commitment to boosting international student enrolments through targeted outreach and by fostering valuable connections between New Zealand institutions and prospective Thai students.

Agent Activities

On June 27, 2024, ENZ launched an online course for education agents in partnership with ICEF Academy. The course offers comprehensive insights into New Zealand's policies, culture, and education system, enhancing agents' ability to promote the country as a study destination. It covers topics such as New Zealand's culture, history, education system, work policies, legislation, and strategies for effective student recruitment and support.

Equipping agents with comprehensive knowledge about New Zealand education enhances their ability to effectively promote the country as a study destination, potentially leading to increased student numbers.

ENZ Agent Seminar in Bangkok

A day prior to the New Zealand Education Fair, ENZ ran an agent seminar on August 30 in Bangkok. The aim of agent seminars is to provide opportunities for New Zealand education providers to have face-to-face engagements with a broad range of new and existing education agents. In addition to supporting the connection between education providers and education agents, ENZ also ran several presentations for both stakeholders, covering topics such as market intelligence and trends, upcoming activities and a dedicated session with Immigration New Zealand specific to the Thai student market.

- 60 providers and 70 agents registered for this event.
- 80% of surveyed agents reported that they were either satisfied or extremely satisfied with this event with a Net Promoter score of 60. 95% of agent respondents indicated that they would be somewhat/much more likely to recommend New Zealand as a study destination after attending the seminar.
- 95% of surveyed providers reported that they were either satisfied or extremely satisfied with this event with a Net Promoter score of 52.94. 100% of provider respondents from the Thailand agent seminar indicated that they were somewhat/extremely satisfied with the connections they made at the event.

Goal 1 – Performance Measures

Measure	Source	Actual 2023/24	Q1 2024/25	Target 2024/25	Comment
Maintain brand preference in targeted markets.	SOI,SPE, EST	4%	-	4%-5%	Measure to be reported in Q3, from Brand Health survey.
Maintain or increase brand awareness (prompted)	SPE	36%	-	>=36%	We should see an increase in impressions with the Learn New Every Day campaign FY24/25 starting at the end of September. In quarter one we are 33.4% of our annual 'impressions' targets against 25% of time lapsed. This is significantly ahead for the year and a strong indication that brand awareness should grow.
Increased number of students proactively gathering information about New Zealand as an international education destination	SPE	355,521	86,215	400,000	We anticipate the rate of take-up to accelerate in coming months as marketing investment kicks-in and interest typically increases. We are tracking well at present. Quarter one target: 81,600
Maintain or increase number of leads to providers (on-line and off-line)	SPE	-*	18,341	75,000	On target. Quarter one target: 16,300
- Online		-	15,280	65,000	A positive start to the year from our digital platforms generating leads. Quarter one target: 13,260
- In person		-	3,061	10,000	Most in-person leads will be generated at our upcoming fairs in the next two months. Quarter one target 3,000.
International students have access to relevant	SOI/EST/ SPE	N/A	-	80%	Measure to be reported Quarter Four through the student experience survey.

information to support their New Zealand education experience.					
The economic contribution from international education is increased.	SPE/EST	-	-	\$3.5 Bn	During quarter one we progressed the Student Expenditure survey, which is an important component of measuring the economic contribution.
Increase in international student enrolments	SPE	-	69,135	85,000	
Diversify New Zealand Source Markets	SPE	35%	-	35%	
- China					
- India		11%	-	11%	
- Others		54%	-	54%	

Goal 2 - Partner and connect

Prime Minister Trade Delegation to Malaysia and South Korea

During Prime Minister Christopher Luxon's trade mission, ENZ supported various education engagements, including participation in Gala Dinners in both countries, a Green Room event with Influential Alumni in Kuala Lumpur, and a New Zealand-Korea Education Partnership Ceremony in Seoul. The main outcomes were:

- MoU between Lincoln University and Universiti Putra Malaysia
- MoU between Lincoln University and Korea Agency of Education Promotion and Information Service in Food, Agriculture, Forestry (EPIS)
- An appreciation gift to school sector partner, Seoul Metropolitan City Office of Education, during the New Zealand-Korea Education Partnership Ceremony

The high-level engagement strengthened educational ties with Malaysia and South Korea, both key markets for New Zealand and reinforced New Zealand's commitment to international education partnerships in the region.

Media releases were published by Lincoln University, and two Korean partners: Korea Agency of Education Promotion and Information Service in Food, Agriculture, Forestry and Seoul City Metropolitan Office of Education. The education events and post-event media coverage helped raise the visibility of New Zealand as an education partner and destination for international students.

ENZ undertook a formal debrief session with the Lincoln University and SIEBA delegates who joined the Mission. The accompanying education delegates expressed positive remarks around the education events organised by ENZ. Whilst delegates noted that education formed a small part of the wider programme, they appreciated the opportunity to spend time with the Prime Minister, Ministers and wider business delegation to raise the profile of the international education sector in both Korea and Malaysia.

Malaysia remains a 'Grow' market for New Zealand's university sector and is included on both the Manaaki New Zealand Scholarship Programme and the Prime Minister's Scholarships for Asia scheme. As noted in the education brief for the Prime Minister ahead of the visit, Malaysia continues to cement itself as an education hub for Southeast Asia and a competitor for international student recruitment.

South Korea is a 'Grow' market for New Zealand's school sector and ENZ leveraged the high-level delegation to strengthen collaboration with Korean education partners.

European Association for International Education (EAIE)

The EAIE Conference is the largest annual B-2-B international education event in Europe, and the second largest in the world after the annual NAFSA conference. 7,300 delegates attended. It amplifies our education credibility and visibility on the world stage. EAIE provides an efficient platform

for ENZ and the sector to maintain relationships with existing institutional partners and to develop relationships with suitable new institutional partners in one place.

All New Zealand universities and two polytechnics attended the conference, with seven universities joining the ENZ hosted New Zealand pavilion. New Zealand providers had over 250 meetings, and ENZ hosted a wine and cheese session at the pavilion for providers to network with key partners and stakeholders. In an example of NZ Inc, NZTE sponsored New Zealand wine for the event.

Five of the seven providers from the Pavilion responded to a survey and all were extremely satisfied.

University of Toronto (UoT) Indigenous Students/Ngāti Rangi Engagement

In early July 2024, ENZ and Ngāti Rangi (South Ruapehu) iwi hosted the University of Toronto's "Indigenous House" for a week at Tirorangi Marae, located at the base of Mount Ruapehu. The engagement aimed to enhance cross-cultural understanding between Māori and First Nations people. The activities included

- Cultural exchange activities at Tirorangi Marae
- Visits to Te Herenga Waka (Victoria University) Māori Faculty
- Visit to Nelson Marlborough Institute of Technology

Key outcomes:

- Strengthened indigenous-to-indigenous connections
- UoT students expressed motivation to learn their indigenous languages upon returning to Canada
- Established foundation for an ongoing reciprocal relationship between ENZ, Ngāti Rangi, and UoT. To this end, UoT is returning to NZ for the 2025 WIPCE conference to give a joint presentation with ENZ.

The collaboration between ENZ, Ngāti Rangi, and University of Toronto's "Indigenous House" demonstrates ENZ's commitment to global indigenous connections, enhancing New Zealand's reputation as a culturally responsive education destination.

China: CEAIE and CCIPE Engagements

CEAIE invited New Zealand as Country of Honour for the 2025 China Annual Conference for International Education. ENZ accepted, with the NZ Ambassador to attend in Beijing in October. This strengthens ties with a key Chinese education organization. CCIPE requested to be an Education Cooperation Arrangement partner, which ENZ plans to pursue, expanding its network in China.

Indonesia LPDP Fair and MARA Collaboration

ENZ and NZ universities joined an LPDP fair in Jakarta, attracting 408 attendees. They also met with MARA to discuss credit mapping for Indonesian students entering NZ bachelor's programs. Both events aim to increase student recruitment and strengthen educational ties.

USA: Gilman Partnership Visit

ENZ hosted U.S. Department of State and Mission NZ representatives. A Gilman Alumni Seminar in Christchurch highlighted postgraduate opportunities in NZ. These engagements promote NZ as a destination for American students, particularly for postgraduate studies.

Prime Minister's Scholarships for Asia and Latin America

The first round for PMSA/LA in the 2024/25 financial year closed on July 19, 2024. ENZ received 324 applications for individual scholarships in total. These applications were short-listed over the following weeks, with selection panels scheduled for September.

Following the awarding of scholarships by the panels, ENZ prepared briefings for both the Minister and the Prime Minister detailing the awardees, including announcement deliverables.

The PMSA/LA program contributes to growing international student numbers by promoting New Zealand's education brand globally and fostering people-to-people connections. By supporting New Zealand students to study abroad, it also helps build reciprocal relationships that can lead to increased inbound students.

Manaaki Scholarships

In the 2023/24 academic year, 174 Manaaki NZ scholars completed their tertiary studies. To celebrate the scholars' achievements, completion ceremonies were held at various universities including AUT, Auckland, Massey, Otago, Lincoln, and Victoria.

Manaaki Scholarship program helps attract high-quality international students to New Zealand institutions, contributing to the growth and diversity of the international student population. By supporting scholars from Pacific nations, it also strengthens New Zealand's educational ties in the region.

Measure	Source	Actual 2023/24	Q1 2024/25	Target 2024/25	Comment
ENZ's key connections and partnerships in targeted markets contribute to a connected New Zealand	SOI/EST	Achieved	Achieved	Qual	This is a qualitative measure assessed by the commentary in Goal 1 and Goal 2 on specific activities.
ENZ's international education insights are valued by the international education sector and NZ Inc agencies.	SPE	New Measure	-	TBD	This is a new measure and under development. We will report on this in Q2.
Maintain or increase Māori and Pasifika participation in the PMSA/LA	SPE	25.0% Māori	23.5% Māori 3.4% Pasifika	Maintain	We are slightly down on Māori participation.
Percentage of payments ENZ makes to tertiary education institutions for the Manaaki NZ scholarships programme that are made within agreed timeframes	SPE	98%	98%	97%	On track.

Goal 3 - Support sector capability development

Sector Tracking Survey

In June 2024, ENZ's annual sector survey achieved a 40% response rate, up from 34% in 2023. Notably, 77% of providers valued ENZ's support, surpassing the previous year's results and the SOI target of $\geq 75\%$.

Key Findings:

- Response rate of 40%, an increase from 34% in 2023
- Universities and education product/service companies were the primary respondents (28% and 25% respectively)
- 77% of providers agreed or strongly agreed that ENZ's support is valued by their organization, surpassing the target of $\geq 75\%$ and improving from 73% in 2023
- 70% of providers were satisfied or very satisfied with introductions facilitated by ENZ over the past 12 months

The survey results demonstrate that ENZ's support is highly valued by international education providers, with improved perceptions compared to the previous year. This positive feedback suggests that ENZ's efforts are effectively supporting providers in their efforts to attract and retain international students.

NZIEC 2024

The New Zealand International Education Conference (NZIEC) KI TUA 2024 was held in August 2024. The event brought together 449 delegates from across the international education sector.

Activities:

- 31 sessions delivered over two days
- 96 speakers, including expert panellists
- Four student voice representatives provided key insights
- Networking events and opportunities for sector engagement
- 1 Country of Honour. The Republic of India was featured as the Country of Honour.

Key Deliverables/Outcomes:

- 86% of respondents expressed high satisfaction with the event
- 449 native trees planted - one for each delegate, as part of ENZ's commitment to sustainability
- 18 partners supported the event, including the Indian High Commission

The conference provided a platform for sector networking, knowledge sharing, and strategic discussions, which supports the growth of international student numbers by enhancing New Zealand's reputation as a quality education destination and improving sector capability to attract students.

This year, India was the Country of Honour, and it was a significant privilege to host the President of India, Smt. Droupadi Murmu. The President reflected on the transformative power of education in her life, the importance of international education for communities, and the valuable contribution of Indian students to New Zealand's educational landscape.

Student Experience

This quarter ENZ has been sharing the results of the International Student Experience Survey 2024 with stakeholders including NZ Inc agencies and education providers. Insights shared support stakeholders to better understand the international student experience in New Zealand and to think about ways and initiatives to improve the overall experience.

International students were also invited as keynotes to share their lived experiences with delegates as part of the NZIEC KI TUA programme, laying down a powerful wero to remember that international students are more than just a number and the importance of continuing to listen to them to enhance the NZ student experience.

EdTech Webinars

ENZ collaborated with EdTechNZ and New Zealand Trade and Enterprise (NZTE) to host webinars exploring opportunities for EdTech exporters. These sessions focused on providing advice for launching and scaling in international markets, with a specific emphasis on Vietnam, Australia and the Middle East.

The key deliverables and outcomes of these webinars included providing EdTech companies with insights into market opportunities and strategies for international expansion. Additionally, they facilitated connections between New Zealand EdTech providers and potential partners or customers in target markets.

These webinars support the growth and international recognition of New Zealand's EdTech sector and the innovation, through new technology solutions, being deployed in education from New Zealand to the world. This initiative increases visibility and potential adoption of New Zealand education technology globally.



NAFSA Visit New Zealand

Dr. Fanta Aw, CEO and Executive Director of NAFSA, and Dr. LaNitria Berger, NAFSA President and Chair of Board of Directors, visited New Zealand in August 2024, including attending NZIEC KI TUA 2024. The key activities were:

- Met with representatives from multiple New Zealand universities
- Engaged with faculty members across various institutions
- Discussed international student support, strategic internationalization, and institutional differentiation

Outcomes and Initiatives:

- Proposed New Zealand site visit for North American Senior International Officers
- Explored new Fulbright scheme focusing on Indigenous issues
- Potential inclusion of New Zealand in NAFSA's international education focus group
- Interest in New Zealand representation at the 2025 NAFSA conference in San Diego

This high-level engagement strengthened connections between New Zealand and NAFSA, a key international education organization. The visit's outcomes are expected to enhance New Zealand's profile as an attractive study destination for North American students, contributing to the goal of growing international student numbers.

SIEBA Conference

The Schools International Education Business Association (SIEBA) conference held June 25-26, 2024, in Auckland, drew over 400 schools nationwide. The theme "Global Threads, Local Ties - Achieving More Together" emphasized collaboration in growing international education. Activities included:

- ENZ Acting Chief Executive Dr Linda Sissons addressed pandemic challenges and school resilience.
- ENZ workshop highlighted resources for schools.
- Presentations and networking opportunities provided.

Key Outcomes:

- Increased awareness of ENZ resources, especially monthly webinars.
- Strengthened connections between ENZ, schools, and government agencies.

The conference equipped schools to better attract and support international students, enhancing New Zealand's appeal as a study destination through collaboration and best practice sharing.

Peak Body Forum

A Peak Body Forum was held on September 11, 2024, at ENZ offices in Wellington. The Peak Body Forum is a formal strategic mechanism to engage with the sector alongside key government agencies, including MOE, MBIE, INZ, NZQA and MFAT. The purpose of the Forum is to discuss sector-wide issues to support the growth of international education. Key activities:

- Discussion of sector-wide issues and strategic priorities
- Engagement between education sector representatives and government agencies

Key deliverables/outcomes:

- Following the June quarterly meeting, a workshop between the Peak Body Alliance and Immigration NZ was scheduled for September 10 to identify focus areas to achieve growth aligned with government priorities.
- Topics for discussion included student visa decline letters, student visa information sheets, and funds and bona fides requirements.

These strategic discussions and workshops aimed to address key barriers to international student growth, particularly around visa processes and requirements. By bringing together sector representatives and government agencies, the Forum worked to align efforts and develop solutions to support increased international student numbers.

Measure	Source	Actual 2023/24	Q1 2024/25	Target 2024/25	Comment
ENZ's support is valued by the international education sector	SOI/Est	77%	-	75%	Measure will be reported in Quarter Four via the sector survey
Provide international education insights that are valued by the sector	SPE	New Measure	Under Development	Under Development	This is a new measure and under development. We will report in Q2.

Goal 4 - Optimise Education New Zealand

Code of Conduct

ENZ refreshed its Code of Conduct, aligning it with organisational values and addressing emerging areas, with the refresh process identifying areas needing strengthening and updating, including privacy, media, social media, and AI.

Key Deliverables

- A refreshed Code of Conduct was developed.
- A staged team-by-team rollout plan was delivered.
- All staff have will be required to sign the refreshed Code.

The refreshed Code of Conduct helps ensure ENZ staff operate ethically and professionally when engaging with international students and partners, strengthening ENZ's reputation as a trustworthy organisation.

Te Tiriti o Waitangi Principles

Measure	Source	Actual 2023/24	Q1 2024/25	Target 2024/25	Comment
Percentage of ENZ staff who have undertaken te reo Māori and cultural training	SOI	93%	Approaching 100%	85%	Te Rito courses 1-4 have reached 100% completion. While Te Rito courses 5-7 only have two remaining people left to complete.

Percentage of ENZ staff who agree or strongly agree that ENZ's actions contribute to the safety and wellbeing of its employees	SOI	85%	-	85%	Reported November via the pulse survey
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Ministerial Products

ENZ continued to provide timely and relevant briefings, reports, and responses to parliamentary questions for the Minister.

- Activities are categorised into Input, Lead, and Review, totalling 141 actions.
- Currently the **Input** category is primarily Written Parliamentary Questions (103), while **Lead** and **Review** includes a mix of activities.
- July was busiest (49 actions), followed by September (43) and August (37).

ENZ action and type of document	Month			Total
	Jul-24	Aug-24	Sep-24	
<i>Input</i>				
Briefing	2	1	2	5
Meeting Advice		1	1	2
OIA - Minister			2	2
Travel advice	1			1
WPQ	38	30	28	103
<i>Lead</i>				
Briefing	3		4	7
Correspondence			1	1
Draft speech	1			1
Information Update				1
Ministerial Correspondence			1	1
Monthly Report		1	1	3
OIA - ENZ	1	3	1	7
OIA – media request	1			1
<i>Review</i>				
Briefing			1	1
Cabinet paper		1		1
OIA - MFAT	1			1
OIA - Minister				1
Proactive release	1			1
Public consultation			1	1
Grand Total	49	37	43	141

5. Risk Management

Update on Risk Management

The key outcomes for this quarter included:

- Separating the Board's strategic risks from the Senior Leadership Team's enterprise risks
- The Board agreeing its 2024/25 strategic risks
- SLT continuing to manage, mitigate, and report on its 2024/25 enterprise risks, with a particular focus on:
 - Using the organisation's resources to effectively scale, leverage, and achieve impact in delivering the Government's diversification goals

- The organisation's external reputation as it affects its ability to be a trusted voice on international education
- ENZ's culture playing a key role in its effectiveness and efficiency as a Crown entity.

These risk management activities enhanced ENZ's risk management framework, which contributes to better informed decision-making and resource allocation that address the challenges to growing international student numbers. By focusing on ENZ's reputation risk, the organisation was better positioned to support the sector's recovery and growth efforts.

6. Looking Forward

In the coming months, ENZ has several key initiatives planned to continue growing international student numbers, building partnerships, and supporting sector capability.

October 2024: ENZ-led Events in Japan, South Korea and Viet Nam

ENZ-led student fairs and agent seminars are planned for October 2024 and survey outcomes will be shared in the Q2 report.

October – November 2024: ENZ Chief Executive travel to China for CACIE

ENZ's Chief Executive, Amanda Malu, will travel to China 30 October – 2 November to attend the China Annual Conference and Expo for International Education (CACIE & CEE) and provide the keynote address at the Gala Dinner on 31 October to announce New Zealand as the 2025 CACIE Country of Honour. The ENZ Sector Engagement team shared the announcement of New Zealand as Country of Honour with the sector and will begin co-planning sector engagement for the event next year.

November 2024: ENZ Agent Seminars in China

ENZ will host Agent Seminars in Beijing, Wuhan and Guangzhou 4-11 November to connect education agents and New Zealand education providers.

November 2024: New Zealand Future Award for Korean students

Applications for the NZFA will close at the end of October and we anticipate the announcement of the Korean award recipients in November. The NZFA, valued at \$5,000NZD per award and administered by ENZ, is open to school students in Korea planning to study at a New Zealand secondary school for minimum one year enrolling in 2025.

December 2024: New Zealand – China Early Childhood Education Symposium

ENZ and China Center for International People to People Exchange (CCIPE) are co-organising the fifth New Zealand-China Early Childhood Education Symposium scheduled 3 December at the University of Canterbury. A delegation of 40 Chinese education representatives will attend the Symposium and participate in a short programme in Christchurch. The Call for Proposals will close in October and the New Zealand presenters will be featured on the Event landing page in November. ENZ is also working with NZ Inc agencies including Ministry of Education for the policy presenter.

December 2024: China Media Famil Outcomes

ENZ expects to receive the final outcomes and impact report from the China Media Famil by December 2024. This will provide insights into the effectiveness of this strategic engagement with Chinese media and influencers.

7. ENZ Financial Performance to 30 September 2024

STATEMENT OF FINANCIAL PERFORMANCE		For the 3 months to 30 September 2024		
\$000s		Actual	Budget	Last Year
Operating Revenue				
Revenue from the Crown - Operating		6,238	6,238	6,812
Other revenue		885	1,333	984
Total operating revenue		7,123	7,571	7,796
Scholarship Revenue				
Revenue from the Crown - scholarships		938	938	938
Total scholarship revenue		938	938	938
Operating Expenditure				
Personnel costs		3,656	3,639	3,605
Contractors & Consultants		41	53	295
Other expenditure		3,018	3,562	3,890
Total operating expenditure		6,715	7,254	7,790
Scholarship expenditure				
Scholarship expenses		12	242	46
Total scholarship expenditure		12	242	46
Net surplus / (deficit)		1,333	1,013	898
STATEMENT OF FINANCIAL POSITION		As at 30 September 2024		
\$000s		Actual	Budget	Last Year
Assets				
Total current assets		7,139	6,181	7,402
Total non-current assets		751	339	464
Total assets		7,890	6,520	7,866
Liabilities				
Total current liabilities		3,119	3,600	4,021
Total non-current liabilities		591	202	231
Total liabilities		3,710	3,802	4,251
Net assets		4,180	2,718	3,615
Surplus made up of:		Year-to-date	Year-to-date Budget	Year-to-date Variance
International Education Programmes		408	318	(90)
Prime Minister's Scholarships		925	695	(230)
Surplus/(Deficit)		1,333	1,013	(320)

STATEMENT OF CASH FLOW		As at 30 September 2024	
\$000s		Actual	Budget
Cash flows from operating activities			
Receipts from the Crown		7,175	7,175
Receipts from Other revenue		820	375
Payments to suppliers, employees and IRD		(7,436)	(7,433)
Net cash flow from operating activities		560	117
Cash flows from investing activities			
Payments for new term deposits		(1,500)	0
Interest received		119	110
Purchase of property, plant and equipment		(47)	(64)
Receipt from maturity of term deposits		1,500	0
Net cash flow from investing activities		72	46
Net cash flow from financing activities		0	0
Net increase/(decrease) in cash		632	163
Cash at the beginning of the year		2,333	329
Cash at the end of the period		2,965	492

Summary

ENZ has completed the first quarter of the financial year. We have some minor timing related variances to our budgeted year-to-date position. The first of two Prime Minister's Scholarships rounds is nearly complete, and expenditure will match budget once the successful recipients accept their offers.

8. Manaaki NZ Scholarship Programme

The Manaaki New Zealand Scholarship Programme (MNZSP) is funded by the Ministry of Foreign Affairs and Trade (MFAT) and is delivered by ENZ. Funding is paid in advance each month to maintain sufficient working capital.

STATEMENT OF FINANCIAL PERFORMANCE		
\$000s		
Scholarship Revenue		
Revenue from MFAT	20,878	14,767
Total scholarship revenue	20,878	14,767
Operating Revenue		
Revenue from MFAT - Operating	691	1,131
Total operating revenue	691	1,131
Scholarship expenditure		
Scholarship expenses	13,945	14,767
Total scholarship expenditure	13,945	14,767
Operating Expenditure		
Personnel costs	515	690
Other expenses	327	441
Total operating expenditure	842	1,131
Net surplus/(deficit)	6,782	(0)
		5,988

For the 3 months to 30 September 2024		
Actual	Budget	Last Year
20,878	14,767	17,268
20,878	14,767	17,268
691	1,131	765
691	1,131	765
13,945	14,767	11,137
13,945	14,767	11,137
515	690	647
327	441	261
842	1,131	908
6,782	(0)	5,988

STATEMENT OF FINANCIAL POSITION		
\$000s		
Assets		
Total current assets	12,564	14,570
Total non-current assets	-	-
Total assets	12,564	14,570
Liabilities		
Total current liabilities	5,782	14,570
Total non-current liabilities	-	-
Total liabilities	5,782	14,570
Net assets	6,782	(0)

As at 30 September 2024		
Actual	Budget	Last Year
12,564	14,570	12,778
-	-	-
12,564	14,570	12,778
5,782	14,570	12,778
-	-	-
5,782	14,570	12,778
6,782	-	(0)

Summary

The Manaaki Scholarship programme expenditure is tracking \$1,111k under the year-to-date (YTD) budget. The variance is attributed Manaaki Scholarships Expenditure: \$822k under the YTD budget and Manaaki Operations and Future State Project: \$289k under the YTD budget.