

STATEMENT OF INTENT 2023-2027

**THINK
NEW**[®]



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Foreword

Rebuilding international education

International education delivers significant educational, economic, and social benefits to students and communities in Aotearoa New Zealand and overseas.

International education builds global skills, knowledge, and cultural competencies for learners throughout Aotearoa New Zealand and creates networks between future leaders in Aotearoa New Zealand and the world. We have much to learn from the world, and much that is unique that we can share with others. International education is one important avenue through which we can make our mark on the world.

And let's not underestimate the significant economic contribution that international education brings to New Zealand. In 2019, before the pandemic, international education directly contributed \$3.7b to the economy from fees and expenditure by international students, expenditure by visiting family and friends, and education and training exports.

International education intersects with many government portfolios, including education, economic development, research, science and innovation, immigration, foreign affairs, tourism, and trade. Our team collaborates across government to foster the creation of international education approaches that work for learners in New Zealand, for the education sector, for our international student community, and for the wider economy.

This sector was one of the hardest hit by the pandemic. By 2022, the value of international education had reduced to \$790m, some international education providers were forced to close, and other providers reduced their offerings.



Tracey Bridges
Board Chair 23 June 2023

But it's a strong and resilient sector, already showing signs of recovery. With the border reopening, international students are now coming here to study and New Zealanders are travelling offshore for study.

Recovery does not just benefit our sector: our sector's recovery is an important part of the country's rebuild. International education is a critical component of the Reconnecting with the World initiative as well as the Trade Recovery Strategy, and Education New Zealand takes our role in making these connections and contributing to this recovery seriously.

There are rebuild challenges that we are facing, and the competitive challenges internationally, that we are working with the sector and our government partners to address.

We are also looking ahead. The last few years have created many opportunities for businesses that deliver education products and services offshore and online. Education businesses in Aotearoa, such as education technology companies, have been able to benefit from these opportunities. We have been working with the sector to explore other forms of innovation and connection that could benefit Aotearoa and the international education community in the future.

International education is part of our nation's DNA. We are new thinkers, we are global citizens, and we are good hosts.

Manaakitanga is a value we hold dear. We have a voice, and international education is one means of making that voice heard in the world. Education New Zealand Manapou ki te Ao is committed to playing our part in this.



Lyn Provost
Deputy Board Chair 23 June 2023

About Education New Zealand

Our purpose is to take New Zealand's education experiences to the world for enduring economic, social and cultural benefit

Who we are

Education New Zealand Manapou ki te Ao (ENZ) is a Crown Agent with a dedicated focus on international education. ENZ brings the New Zealand Government's goals for international education to life, bringing benefits to New Zealanders and international learners.

Our role as a Crown Agent is to work with others to deliver on the international education outcomes and services prioritised by the government for New Zealanders. We give effect to government policy, and as part of the wider public service, we uphold the purpose, principles and values of the public service when carrying out our functions. We factor the Government's goals for the Public Service and the wider public sector into our strategic and operational plans, to ensure we are reflecting the government's objectives, where appropriate. The Ministry of Education and the Ministry of Business, Innovation and Employment are our monitoring agencies.

Our name, Manapou ki te Ao, has two parts. 'Manapou' means supporting and sustaining life, which allows growth and progression. 'ki te Ao' is a call to action for us to take New Zealand's education to the world. Together, our name defines our part in enabling students to flourish and in creating the world's next generation of problem solvers.

Section 511 of the Education and Training Act 2020 sets out ENZ's functions (refer to Appendix 2) which include promoting Aotearoa New Zealand education offshore, providing information to international students in Aotearoa New Zealand, undertaking research and providing intelligence, and acting for the Government in relation to international education.

The New Zealand International Education

Strategy 2022-2030 (NZIES) guides ENZ's goals and activities as we support the rebuild of the sector. The NZIES sets out a clear path for Aotearoa New Zealand's international education sector under its two Focus Areas and three goals.

Our strategic framework

ENZ supports the international education sector, other government agencies and other partners to sustain the value of international education to New Zealanders. While the NZIES sets the high-level direction for ENZ, our purpose, vision and mission provide the foundation for achieving our outcomes.

How we work

ENZ works to deliver on our purpose through a range of targeted, value-added services to international education in Aotearoa New Zealand and offshore.

To fulfil our purpose, ENZ works with international students, domestic students seeking an international education experience, the international education sector onshore and offshore, other Aotearoa New Zealand government agencies and offshore government partners, sector peak bodies, Aotearoa New Zealand's regions and other governments. ENZ brings the international student voice into decision-making and broader promotion of Aotearoa New Zealand.

ENZ is also part of the New Zealand Story which works to enhance global perceptions and favourability of Aotearoa New Zealand.

Our vision

Our vision is to transform lives through Aotearoa New Zealand's international education experience. With this focus, ENZ will achieve the outcome of the refreshed NZIES of enabling a thriving and globally connected

Aotearoa New Zealand through world-class international education. Over the next four years, with Te Tiriti as its foundation, ENZ's will achieve its vision by:

- **Empowering** the Aotearoa New Zealand international education sector
- **Connecting** Aotearoa New Zealand education globally

- **Partnering** for mutual economic, social and cultural benefits.

Our mission

ENZ's mission is to lead the transformation of international education to a sustainable, diverse and resilient sector.

Our people

Ngā Manapou

As part of developing our Rautaki Māori (Māori Strategy), ENZ identified our Ngā Manapou (principles):

- Aroha
- Manaakitanga
- Kaitiakitanga
- Be One
- Be Bold

Ngā Manapou are the set of values that establish support, enhance, and sustain the mana of a person. They are foundational to ENZ's culture and set out how staff are expected to behave and interact with other people.

Our Ngā Manapou create the foundation for ENZ Manapou ki te Ao and support the Aotearoa New Zealand international education brand.

Our Board

ENZ's Board is made up of members appointed by the Minister of Education. The Board is responsible for ENZ's governance, including setting its strategic direction and monitoring performance. The Board meets regularly to carry out governance functions and address challenges and opportunities affecting international education.

On the Board's behalf, the Audit and Risk Committee monitors the financial and risk management of ENZ. This year, the Board of

ENZ is establishing a People, Culture, Health and Wellbeing Committee that will provide oversight of the wellbeing, capability and remuneration of our people.

ENZ's staff

ENZ employs 109 staff spread across the world. Our offshore staff are generally co-located with other government agencies in New Zealand Embassies and High Commissions. Offshore staff leverage international diplomacy programmes, broker key relationships connecting Aotearoa New Zealand education to the world, lead in-market initiatives, gather market intelligence and promote Aotearoa New Zealand education to prospective international students, education agents and other governments.

To ensure we can deliver on the Government's priorities and deliver our work programme, ENZ works to ensure that we have the capability, systems and processes needed to do so. For example, Te Rautaki Māori team have been working to increase cultural competence and capability within ENZ. This includes resources and activities to encourage staff to improve their te reo Māori skills.

ENZ's work to support Māori-Crown relationships

ENZ Manapou ki te Ao is committed to giving practical effect to the Crown's Te Tiriti o Waitangi (Te Tiriti) responsibilities, including

delivering on Ka Hikitia – Ka Hāpaitia¹ (the Māori Education Strategy) and Tau Mai Te Reo² (the Māori Language in Education Strategy) in our work and giving effect to Te Tiriti obligations in the Education and Training Act 2020.

Having this embedded within ENZ will add to the impact of Manapou ki te Ao as we promote Aotearoa New Zealand's education offering in a post-pandemic world.

Letter of Expectations

The Minister's Letter of Expectations emphasises key levers for ENZ Manapou ki te Ao that have the potential to deliver longstanding change. We do this primarily through qualitative engagement with Māori, iwi, hapū and Māori providers of education products and services to transform the understanding of international education and ensure international education delivers both with, and for, Māori. Our goal is to ensure the richness of Te Ao Māori is imparted within our organisation and beyond from ENZ into the international education eco-system.

ENZ received a new Letter of Expectations from its Minister in May 2023 and is currently working on incorporating the Minister's expectations throughout ENZ via He Rautaki Māori.

He Rautaki Māori

Since the development of our first Māori strategy, He Rautaki Māori in 2018, we have continually refined and strengthened our commitment to our Te Tiriti responsibilities and obligations of being valued and conducive partners on this shared journey, most recently in 2021. The current strategy has three distinct, but intertwined, focus areas.

Pou Roto (internal)

is reflective of ENZ and its values. Our work towards Māori-Crown relations as a valued across-Government partner is also part of

driving enhanced staff capability within Aotearoa New Zealand and around the world.

Pou Waho (external)

is about partnerships and relationships. We have identified indigenous-to-indigenous education as a central lever of this.

Partnerships with iwi and hapū are a key component of ensuring Pou Waho evolves to better inform the sustainable contribution indigenous education can make both to New Zealanders and international students.

Pou ki te Ao (international)

is building blocks. Constructive relationships lead to conversations, interactions and nurturing. This visibility on a global stage can bind sustainable indigenous partnerships and drive the concept of a global citizen.

Who we work with

Aotearoa New Zealand's international education sector (the sector) is made up of English language schools, private training establishments, schools, Te Pūkenga, universities, wānanga, providers of education products and services (like education technology companies and education publishers), education agents and government agencies.

We work with all parts of New Zealand's diverse international education sector, including international students³, exporters of education products and services, education providers in New Zealand and offshore, and education agents. We support work across the global education system, including New Zealand government agencies, other governments, and other organisations who form part of the international education sector.

We engage with international students at all stages of their student journey – from when they are just beginning to dream about a New Zealand study experience through to becoming alumni with successful careers in countries all

¹ <https://www.education.govt.nz/our-work/overall-strategies-and-policies/ka-hikitia-ka-hapaitia/>

² <https://www.education.govt.nz/our-work/overall-strategies-and-policies/tau-mai-te-reo/>

³ International students are non-residents of New Zealand and have expressly entered New Zealand with the intention of study or have enrolled with a New Zealand provider overseas. ENZ counts international PhD students, exchange students, NZ Aid students, foreign research postgraduate students and full fee-paying international students as international students.

around the world.

Through the Prime Minister's Scholarships, we work with New Zealand students by supporting overseas study opportunities that help develop their global citizenship and other skills.

ENZ's funding

ENZ is funded through two Vote Tertiary Education appropriations and receives funding from MFAT to administer the Manaaki New Zealand Scholarships programme.

Funding decreased from 2021/22 to 2022/23 due to:

- Pre-COVID-19, ENZ received \$3.265m per financial year from the Export Education Levy as part of our funding to help fund our promotion and marketing activities (including the

Aotearoa New Zealand education brand), research, and professional development of the international education sector. With the suspension of the Levy until 1 January 2023, ENZ received replacement Crown funding until 2022/23. As a result, ENZ's funding decreased, constraining our activities as the border reopened.

- One-off funding for brand awareness, marketing and communications to support the post-COVID rebuild was received in 2021/22.

Baseline funding will decrease further from 2022/23 to 2023/24 with the completion of time-limited funding to support work to diversify international education products and services.

Government priorities

The Government has clearly signalled its strong support for international education through the NZIES. With borders having reopened, international education can play a key role in reconnecting Aotearoa New Zealand with the rest of the world and quality, high-value international education. Taking a phased approach to rebuilding and diversifying the sector will ensure it is more sustainable and resilient. We support the responsible management of the Government's finances by ensuring we deliver our work programme efficiently and effectively, and by delivering value for money.

Te Tiriti o Waitangi

The Government has a strong commitment to honouring and giving effect to the Crown's Te Tiriti responsibilities. For ENZ, this means considering how we can partner with iwi, Māori and Māori providers of education services in relation to international education; supporting education in te ao Māori, tikanga and te reo Māori as an integral part of our international education offering; and lifting our leadership and staff cultural capability and practice to support the Crown to meet its

public sector objectives for Māori-Crown relationships.

New Zealand's education system

At the heart of international education is a strong, equitable, high-quality education system with a vibrant international focus, and globally connected students, workers and education providers.

ENZ will continue to engage with other education agencies to ensure our work supports and enhances the role of international education within the education system.

Tertiary Education Strategy (TES) 2020

The TES outlines the strategic priorities that support the shared outcomes for New Zealand's tertiary education system. We work with New Zealand's other education agencies and with tertiary education organisations to support progress against these strategic priorities within the context of international

education.

Statement of National Education and Learning Priorities (NELP) 2020

The NELP sits alongside the TES and focuses on schools, kura, and early learning services. ENZ supports strategic priorities within the NELP as they apply to international education, such as ensuring a focus on putting learners at the centre of education.

International Student Wellbeing Strategy

This strategy, released in 2017, is designed to protect and enhance New Zealand’s reputation as a safe and welcoming study destination. The overarching outcomes focus on economic wellbeing, education, health and wellbeing, and inclusion.

The New Zealand International Education Strategy 2022-2030

The NZIES sets out the Government’s vision for international education. This is to build a new future for the sector following the disruption of the pandemic by developing a high-value, resilient and innovative sector for both international and domestic students.

The Strategy’s vision is for *a thriving and globally connected New Zealand through world-class international education*. It has two Focus Areas and three overarching goals. The Focus Areas are:

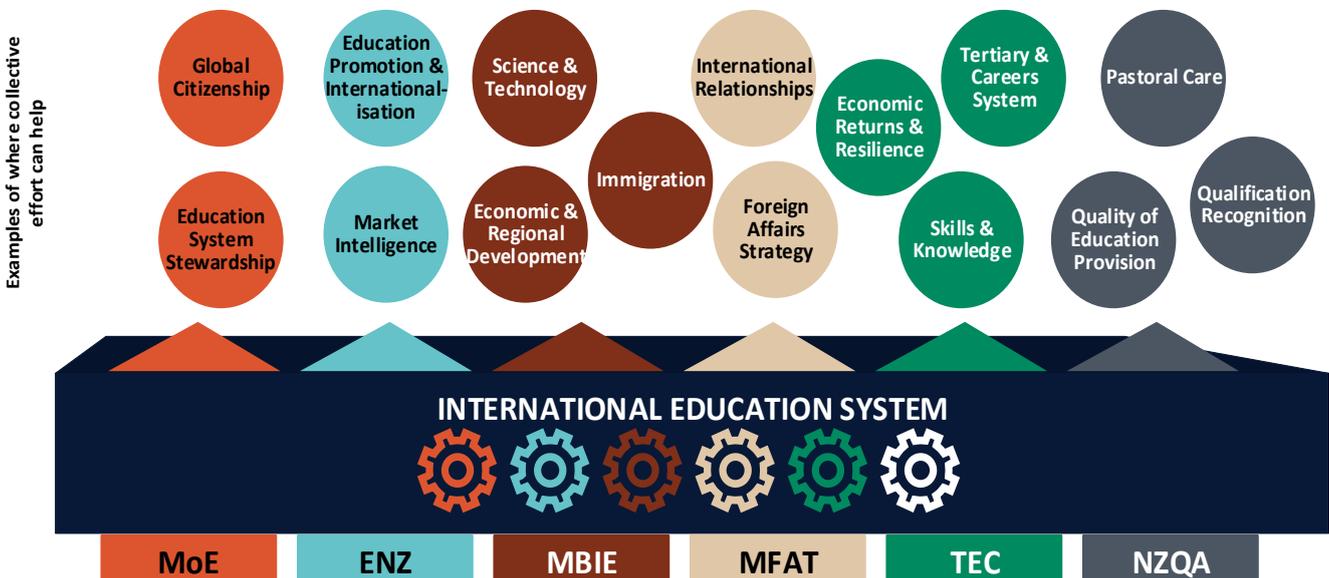
1. **Build and recovery** over the short-term, addressing the immediate need to help providers rebuild student recruitment and onshore delivery following the COVID-19 border closures. This will give us the

foundation for Focus Area 2. Activities in this area include promoting international education through, for example diplomatic travel undertaken as part of reconnecting Aotearoa New Zealand with the world.

2. **Building a new future for international education** over the medium to long-term focusing on diversification to build a more resilient international education sector which is less reliant on onshore education delivery.

The overarching goals are:

- **delivering an excellent education and student experience** so that international students receive a high-



quality education, feel welcome and safe, and receive an excellent overall international student experience beyond the classroom.

- **ensuring international education is resilient and sustainable** by making sure international education student enrolment is based on quality, attracts students into the regions (also helping to meet skill shortages), and helping international education to flourish through diversification of markets, people flows and innovative products and services.
- **developing global citizens** by helping all students gain the knowledge and skills they need to live, work and learn globally, providing stronger global connections, research links and partnerships, and helping New Zealanders to understand and embrace the benefits of international education.

ENZ is working alongside the Ministry of Education, other agencies and the sector to implement the NZIES and deliver on the Action Plan.

Other portfolios and agencies involved

Aotearoa New Zealand's policy environment for international education is complex. Policy and regulatory settings affect international students, Aotearoa New Zealand students looking to undertake an international education experience, and international education providers and businesses. An aligned and coordinated approach across key government agencies is important to ensure Aotearoa New Zealand achieves the best overall benefits from international education.

We engage regularly and comprehensively with core partners. They include the Ministry

of Education as the primary monitoring agency and education system policy agency, and ENZ's other monitoring agency, the Ministry of Business, Innovation and Employment (MBIE). MBIE also has policy responsibility for relevant critical areas including immigration settings and the labour market, with international education providing opportunities to help address Aotearoa New Zealand's skill shortages.

Immigration New Zealand (INZ) is another key agency partner. INZ makes decisions about who can be granted a visa to enter the country and study here.

There are other agencies with a stake in international education including the Ministry of Foreign Affairs and Trade (MFAT).

Education is a valuable tool for building diplomacy networks and bilateral trade outcomes for Aotearoa New Zealand, as illustrated in the Trade Recovery Strategy⁴ where international education contributes to two key areas ("trade and export lift" and "resilience").

Given our common objectives and responsibilities in the international education scholarships space, and reflecting each agency's strengths, ENZ recently partnered with MFAT to deliver the Manaaki New Zealand Scholarship programme, the Aotearoa New Zealand government's single largest investment in international education scholarships.

ENZ collaborates with other education focused agencies including the New Zealand Qualifications Authority which has responsibilities for the recognition of Aotearoa New Zealand's qualifications offshore and administering the Education (Pastoral Care of Tertiary and International Students) Code of Practice 2021. There are also trade and international synergies with agencies like Tourism New Zealand and New Zealand Trade and Enterprise, while others such as the Human Rights Commission and the New Zealand Police, help create the environment for international students studying here.

⁴ <https://www.mfat.govt.nz/en/trade/trade-recovery-strategy/trade-recovery-strategy-2-0/>

ENZ's operating context

The international environment

The border has reopened, with international education providers working to attract international students to study in Aotearoa New Zealand. This has been an opportunity to continue to accelerate the move that was being made from volume to value, as international education providers build back their offerings and reconnect with their international markets. In turn, this has created an opportunity to rebuild a sector that has historically delivered significant social, cultural and economic benefits to New Zealand.

Through our offshore footprint and international activities, ENZ facilitates connections to a broad network of partners and stakeholders that contribute to Aotearoa New Zealand's socio-economic, diplomatic and foreign affairs goals and those of our partners.

ENZ has been working to build prospective students' and their influencers' interest, awareness and preference for Aotearoa New Zealand as an education destination through our activities. International education

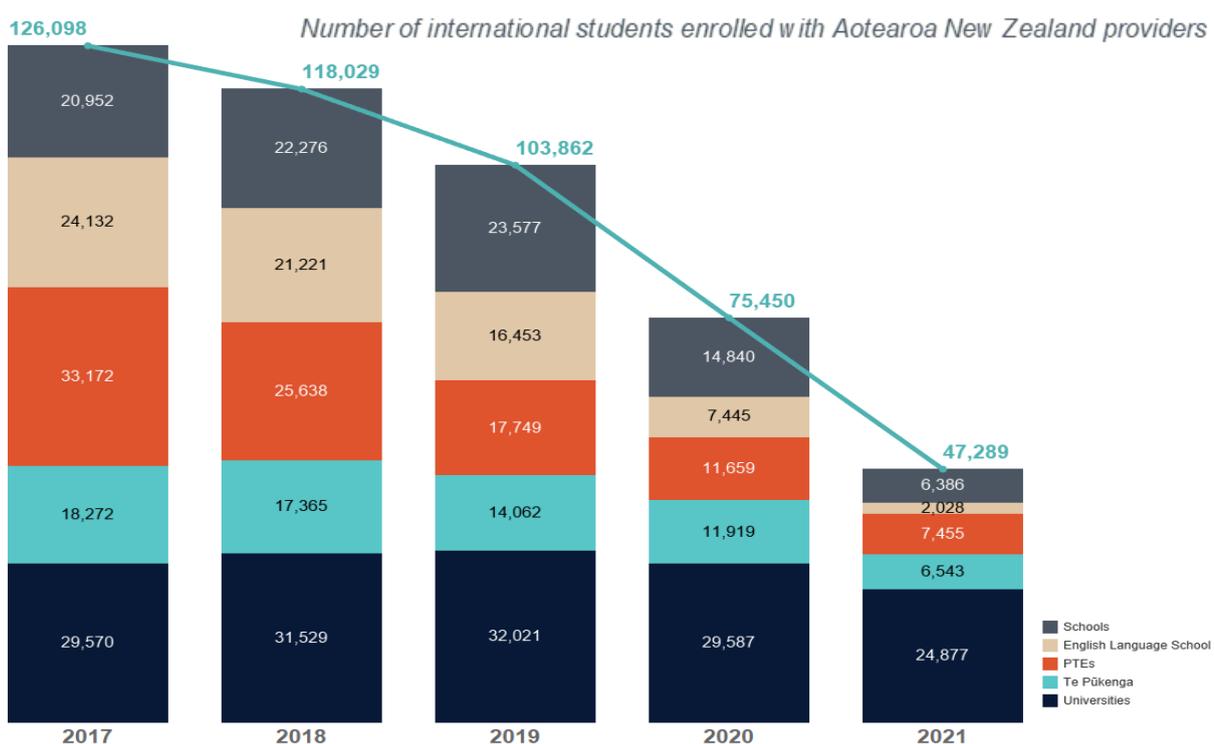
providers have also been working to attract and to enrol international students.

This creates an opportunity to reposition Aotearoa New Zealand as a provider of high-quality education that changes people's lives through telling the New Zealand education story and working with the sector.

Global competitiveness and response to COVID-19

International education is intensively competitive. Countries often compete on the attractiveness of their "offering" to international students. Many of Aotearoa New Zealand's competitors have made their "offering" more attractive through changes to their policy settings. Their changes have included:

- Australia waiving the cost of a further student visa application where the student couldn't complete their course due to the



pandemic⁵

- Canada temporarily lifting its 20 hour per week cap on the number of hours that eligible post-secondary students are allowed to work off-campus while class is in session⁶
- Australia allowing qualified international student graduates to stay and work in Australia for an additional two years.⁷

These changes create challenges for Aotearoa New Zealand's international education providers as they seek to rebuild in terms of size and speed.

With the significant reduction in international students in Aotearoa New Zealand since 2020, international education providers have lost some of their capability and capacity to rebuild their student attraction activities and support international students' experiences. Reductions in ENZ's funding and education providers' ability to fund international travel is affecting their ability to promote studying in Aotearoa New Zealand.

International education in New Zealand

Overall, we are seeing positive signs of growth in attracting international students to Aotearoa New Zealand which is reflected in international student visa application numbers. However, international education providers are in the early stages of the rebuild.

International students are concerned about affordability and conscious of the costs incurred by travelling for international education. The cost of living, tuition fee costs, air connectivity and changing exchange rates all feed into these concerns and impact on the students' decisions of where to study.

Funding changes with the completion of the COVID-19 Response and Recovery Fund and changes in the Export Education Levy⁸ means that our work programme to promote the Aotearoa New Zealand education brand, undertake research and support the sector's capability is affected. While the Export

Education Levy has recently been reinstated, in the short-term, it is unlikely that the Levy will mirror pre-pandemic levels.

International education is a highly competitive global sector. New Zealand's international education sector is made up of schools, universities, wānanga, Te Pūkenga, private training establishments, English language schools and education businesses (including education technology).

Before the onset of the COVID-19 pandemic in early 2020, international education was New Zealand's fifth largest export sector. The sector was one of the hardest hit by the pandemic and subsequent border closures.

Student mobility

Attracting international students for study onshore

Typically, prospective international students and their parents select the country to study in and then select either the course or international education provider. This means that building interest, awareness and preference for Aotearoa New Zealand as an education destination is important to then enable international education providers to promote themselves and their education offerings. Overall, the global market for international education is sizeable. In the 2020 academic year, 4.4 million international students were studying in an OECD⁹ country, 70% more than a decade ago.¹⁰ International education is a global, intensively competitive sector with Aotearoa New Zealand competing

⁵ <https://www.homeaffairs.gov.au/covid19/visa-information/refunds-and-waivers#:~:text=If%20you%20have%20paid%20for,on%20your%20original%20VAC%20receipt>

⁶ <https://www.canada.ca/en/immigration-refugees-citizenship/news/2022/10/international-students-to-help-address-canadas-labour-shortage.html>

⁷ <https://www.studyaustralia.gov.au/news/post-study-work-rights-extended>

⁸ The Export Education Levy is paid by international education providers based on their international student enrolment numbers.

⁹ OECD is the Organisation for Economic Co-operation and Development.

¹⁰ OECD, *International Migration Outlook 2022*, October 2022

on a range of factors focused on the attractiveness of the “offering” offered to international students.

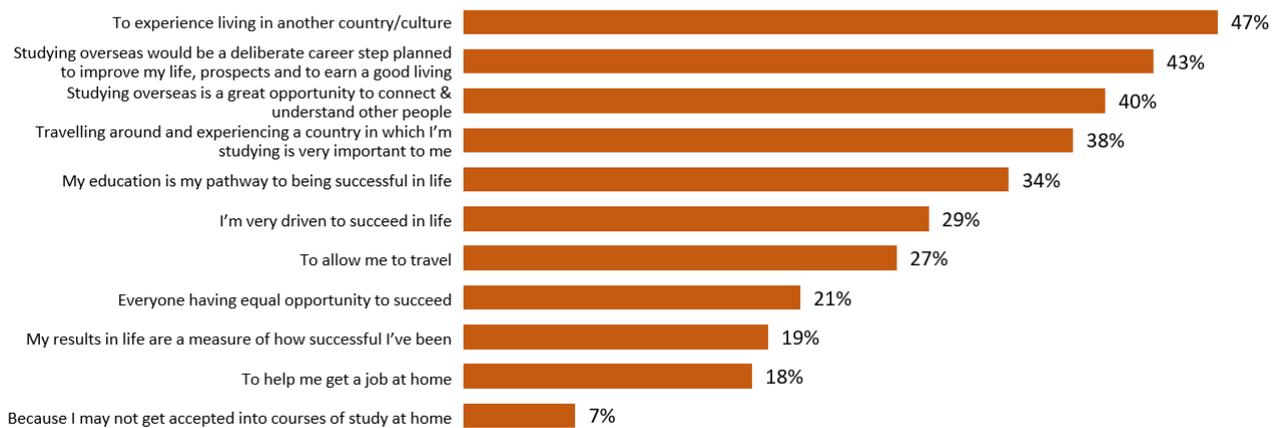
The factors in the country decision are broadly unchanged. “Providing you with the knowledge, applied skills and adaptability that will make you ready for the future of work” remains the number one country choice driver.¹¹

Students are still considering studying for the same core reasons; to live and travel internationally, meet new people and to

enhance their employability. The pandemic has only slightly altered the level of demand for international study.¹²

In-study and post-study work rights are an integral part of the “offering” for international students. For students, employability has been found to be a key factor in deciding to study offshore and choosing where to study.¹³ A 2019 survey of international graduates in Australia showed that 76% considered access to post-study work rights.

Why students are still considering study offshore in 2022



Our operating intentions

To support the rebuild of the international education sector and the outcomes from the refreshed NZIES, we have identified five goals that will focus our efforts. Under these five goals are a range of initiatives and activities that we will undertake in the short term. Our initial focus will be to renew interest in New Zealand as a high-quality international education destination and remind prospective international students of our unique education offering.

Our impact measures reflect our contribution towards the NZIES outcome of a thriving and globally connected Aotearoa New Zealand through world-class international education.

Our five goals are:

- Grow inbound student mobility for Aotearoa New Zealand
- Support industry capability development
- Build global connections
- Encourage and support innovation in the sector
- Drive operational excellence.

¹¹ Kantar, *Understanding the New Zealand education brand in key markets: Brand Health 2022*, July 2022.

¹² Kantar, *Understanding the New Zealand education brand in key markets: Brand Health 2022*, July 2022.

¹³ QS, *International Student Survey: Volume 2: Information and Influence*, 2020.

MANAPOU KI TE AO STRATEGY 2023-2027



Ngā Manapou

- MANAAKITANGA** (Icon: geometric shapes)
- KAITIAKITANGA** (Icon: hand holding a torch)
- BE ONE** (Icon: circle divided into four quadrants)
- BE BOLD** (Icon: diamond divided into four quadrants)
- AROHA** (Icon: heart divided into four quadrants)

Outcome

A thriving and globally connected Aotearoa New Zealand through world-class international education

Vision

Transforming lives through international education experiences

Strategic statement

With Te Tiriti as our foundation, we will empower and connect the international education sector globally and partner for mutual economic, social and cultural benefits for Aotearoa New Zealand

Goals

- 1 Grow inbound student mobility for Aotearoa New Zealand**
- 2 Support sector capability development**
- 3 Build global connections**
- 4 Encourage and support innovation in the sector**
- 5 Drive operational excellence**

Grow inbound student mobility for Aotearoa New Zealand

ENZ's work in this area aligns with Focus Areas One and Two of the NZIES, and with Goal One: Excellent education and student experience.

There is an immediate need to build international education, and the first priority is to help providers rebuild their bases for onshore student delivery, and to rebuild sustainably so that international education can come back even better than it was before

and give us the foundation we need to build a new future that is diversified, high-value and resilient.

Our drive across the four years of this Statement of Intent will be to maintain preference for New Zealand and to ensure international students have access to the information they need while studying in New Zealand.

A. Impact Measure: Maintain brand preference in targeted markets

Indicator of success: Percentage of students interested in studying overseas who prefer New Zealand as a study destination.

| Actual 2023 | Target 2024 | Target 2025 | Target 2026 | Target 2027 |
|--------------|------------------------|-------------|-------------|-------------|
| Not measured | Establish new baseline | Maintain | Maintain | Maintain |

Note: This measure is based on the outcomes of the ENZ Brand Health Survey. It is a new measure that reflects ENZ's contribution to Focus Areas One and Two of the New Zealand International Education Strategy 2022-2030, which was refreshed in June 2022. It will capture a new metric for measuring ENZ's performance. It is aligned with, but not comparable to, ENZ's performance measure for 2022/23 which was 'Prospective international students' preference for a New Zealand education is increased'.

B. Impact Measure: International students have access to timely, relevant and useful information to support their New Zealand education experience

Indicator of success: Percentage of international students in New Zealand who indicate they have access to timely, relevant and useful information to support their New Zealand education experience.

| Actual 2023 | Target 2024 | Target 2025 | Target 2026 | Target 2027 |
|---------------------------|-------------|-------------|-------------|-------------|
| New measure ¹⁴ | Increase | Increase | Increase | Increase |

Note: This measure reflects ENZ's focus on supporting international students currently in New Zealand. It is based on the response to a series of detailed questions in the International Student Experience Survey. This is a new measure that reflects ENZ's contribution to Goal One of the New Zealand International Education Strategy 2022-2030, which was refreshed in June 2022. It will capture a new metric for measuring ENZ's performance.

Support industry capability development

This area of ENZ's work aligns with Goal Two of the NZIES: Sustainable and resilient.

ENZ works with international education providers, sector peak bodies, and regional economic development agencies to strengthen capability in the long-term. While

our immediate focus is to support the immediate capability needs to attract international students to Aotearoa New Zealand and support the student experience, ENZ's activities will evolve to reflect ENZ's value proposition and feedback from the sector.

¹⁴ Nielsen 'International Student Survey'.

We continue to develop a deep understanding of Aotearoa New Zealand's capacity and capability for international education, so we can identify the opportunities and barriers for sustainable development.

ENZ supports the sector in their decision-making about new opportunities, using our

expertise and insights to guide the sector towards new opportunities, and supporting them to develop the capability and capacity to deliver on these opportunities. To do this, we undertake and share our research with the sector, including research on market perceptions of quality and how Aotearoa New Zealand's education is perceived internationally.

C. Impact Measure: ENZ's support is valued by the international education sector

Indicator of success: Percentage of the international education sector that values ENZ's support

| Actual 2023 | Target 2024 | Target 2025 | Target 2026 | Target 2027 |
|--------------|-------------|-------------|-------------|-------------|
| Not measured | ≥75% | Increase | Increase | Increase |

Note: This measure is based on the response to a series of detailed questions in the International Education Sector Survey. This is a new measure that reflects ENZ's contribution to Goal Two of the New Zealand International Education Strategy 2022-2030, which was refreshed in June 2022. While it is a new measure, the target for 2023/24 has been estimated based on two of ENZ's performance measures for the 2022/23 year, where we measured specific aspects of the international education sector's satisfaction with ENZ's services and products

Build global connections

This area of work supports Goal Three of the NZIES: Global Citizens.

ENZ provides support, advice and guidance to international education providers who are interested in establishing and maintaining relationships with offshore education institutions. We support and undertake Government-to-Government activities, and support institutional, academic and research relationships. We use our international relationships, data and market intelligence to support the sector to leverage opportunities and position Aotearoa New Zealand as a high-quality education partner.

Prime Minister's Scholarships for Asia and Latin America

ENZ administers the Prime Minister's Scholarships for Asia and Latin America (PMSA/LA) to help New Zealand students benefit from offshore study opportunities, build life-long friendships and networks, and enhance their skills and understanding of the world.

A review of the PMSA/LA that was carried out during the 2020/21 year has provided an

improvement programme that will better support the development of global citizens in New Zealand in the future. The refreshed scheme will ensure that the PMSA/LA will be more accessible for a broader and more representative range of New Zealanders, and support further development of New Zealanders' cultural capabilities.

Manaaki New Zealand Scholarship Programme (MNZSP)

ENZ and the Ministry for Foreign Affairs and Trade (MFAT) have agreed to terms for ENZ to undertake the operational management of the MNZSP for an initial five-year-period, with the long-term intention for this partnership to be a multi-decade one. The partnership between the two agencies will enhance international education relationships with developing country partners and deliver closer connections with scholarship partners and tertiary education providers. The agreement is a significant lever to contribute to achieving the goals of the refreshed NZIES and aligns strongly to ENZ's four-year strategic framework.

We intend to leverage the MNZSP to broaden scholarship opportunities across the New

Zealand tertiary sector, contributing to the delivery of Phase Two of the NZIES through diversifying the sector's education offering

and ensuring that the outcomes for the scholars are enhanced.

D. Impact Measure: ENZ's key connections and partnerships in targeted markets contribute to a connected NZ. Indicator of success: Number and quality of ENZ key connections and partnerships that contribute to a connected New Zealand.

| Actual 2023 | Target 2024 | Target 2025 | Target 2026 | Target 2027 |
|--------------|--------------------|-------------|-------------|-------------|
| Not measured | Establish baseline | Increase | Increase | Increase |

Note: This is a new measure that demonstrates how New Zealand's international connections in targeted markets contribute to the rebuild of international education in line with Goal Three, and Focus Areas One and Two, of the refreshed New Zealand International Education Strategy 2022-2030. It will capture a new metric for measuring ENZ's performance and therefore we are unable to estimate a target.

Encourage and support Innovation

Alongside our efforts to rebuild New Zealand's profile, we will continue our work to support the sector to diversify. In the first quarter of 2023/24, ENZ will be developing insights from the CRRF funded programme. We will work with MoE to develop and finalise recommendations on systems, products and channels to diversify education products and services that will contribute to the sustainable development of the sector. ENZ will provide recommendations to the Government by September 2023. These insights and

recommendations will also feed into the development of Focus Area Two of the NZIES which is to 'build a new international education future'. We will continue to work closely with the sector to build capability in this area as required.

We will continue to collaborate and co-create with iwi, Māori and Māori providers of education products and services, to transform the understanding of international education and ensure that the education system delivers with, and for Māori in the international context.

Our organisational development

We prioritise our activities to ensure that we deliver the best return on the Government's funding for ENZ. Our capabilities, systems and processes position us well to make a significant contribution towards the goals of the refreshed NZIES. However, there are risks that could impact on the achievement of these goals, some of which are identified in the risk section of this Statement of Intent.

Our Ngā Manapou (values) are Manaakitanga, Kaitiakitanga, Be One, Be Bold, and Aroha.

Drive operational excellence

ENZ employs 109 staff spread across the world. ENZ's offshore staff are generally co-located with other government agencies in New Zealand Embassies and High Commissions. Offshore staff leverage international diplomacy programmes, broker key relationships connecting Aotearoa New Zealand education to the world, lead in-market initiatives, gather market intelligence and promote Aotearoa New Zealand education to prospective international students, education agents and other governments.

To ensure we can deliver on the Government's priorities and deliver our work programme, ENZ works to ensure that we have the capability, systems and processes needed to do so. For example, Te Rautaki Māori team have been working to increase cultural competence and capability within ENZ. This includes resources and activities to encourage staff to improve their te reo Māori skills.

Good employer matters

We recognise the need for a diverse workforce to effectively deliver services to our stakeholders. We provide equal employment opportunities to make the most of the talents of all our people, including through our Rautaki Māori, built on the foundations of Te Tiriti o Waitangi.

Our status as a good employer will be assessed against the elements and criteria set out by the Human Rights Commission. Over the next four years we will continue to ensure that all elements are in place and working well through our People Strategy.

We will continue to run an employee engagement survey. Based on its results, we will develop and implement solutions for identified areas of improvement.

Our technology

ENZ is a globally connected and communicating organisation. We use cloud-based technology to deliver tools such as email, video conferencing, intranet and our document management and customer relationship management systems. This has seen a significant improvement in data and personal interaction across the organisation.

We will continue to focus on improving our student and sector facing digital platforms across a range of services including student experience and wellbeing and capturing students' journeys to graduation and into post-study.

Our expertise

We are increasingly using data and evidence, including insights from our global marketing activities, to review and refine our business activities, and to inform our decisions about future investment. We seek to allocate our resources to achieve the maximum impact for a given level of risk. We are focused on strategic financial management and achieving value for money.

We have processes in place to plan and monitor our business activities. This will enable us to achieve the maximum economic, social and cultural benefits for New Zealand for the investment we make.

Our systems and processes

Capital and asset management intentions

ENZ incurs minor capital expenditure for the lifecycle replacement of furniture, office equipment and computer hardware. We have one motor vehicle in Beijing, China that we own and is fully depreciated, and one that we lease in Singapore.

The table below summarises the forecast value of our capital assets as at 30 June 2022 and our forecast capital expenditure to 2025/26.

| \$000s | Forecast net book value at 30 June 2023 | Commentary | Plan 2023/24 | Plan 2024/25 | Plan 2025/26 | Plan 2026/27 |
|--------------------------------------|---|--|--------------|--------------|--------------|--------------|
| Furniture and office equipment | - | Lifecycle replacement only | 200 | 20 | 20 | 20 |
| Computer hardware | 176 | Lifecycle replacement of hardware only and a continued move to the cloud and 'as a service' model' | 50 | 50 | 50 | 50 |
| Leasehold improvements and make-good | - | Queen Street Auckland office 2022 and Lambton Quay office fit-out completed in 2023 | 75 | 75 | 75 | 75 |

Management measure: ENZ staff have an understanding of and are empowered to uphold the principles and articles of Te Tiriti

Indicator of success: Percentage of ENZ staff who have undertaken te reo Māori and cultural training

| Actual 2023 | Target 2024 | Target 2025 | Target 2026 | Target 2027 |
|--------------------|-------------|-------------|-------------|-------------|
| Establish baseline | 85% | Increase | Increase | Increase |

Note: This measure was established in ENZ's 2022-2026 Statement of Intent. It aligns with ENZ's Letter of Expectations from its Minister.

Management measure: ENZ staff are satisfied with the actions taken by ENZ to build and maintain safety and wellbeing

Indicator of success: Percentage of ENZ staff who agree or strongly agree that ENZ's actions contribute to the safety and wellbeing of its employees

| Actual 2023 | Target 2024 | Target 2025 | Target 2026 | Target 2027 |
|--------------|-------------|-------------|-------------|-------------|
| Not measured | 85% | Increase | Increase | Increase |

Note: This is a new measure that reflects ENZ's focus on staff safety and wellbeing. The measure will be captured via staff surveys throughout the year.

ENZ's risk management approach

Because international education delivers significant educational, economic, and social benefits to Aotearoa New Zealand but was

one of the sectors hardest hit by the pandemic and subsequent border closures, risk management remains an integral component of

the successful rebuild and recovery of the sector in the short term, while delivering high-value benefits to all New Zealanders in the longer term, in accordance with the refreshed *New Zealand International Education Strategy 2022-2030* (NZIES).

ENZ has a risk management framework that provides a consistent way to identify, assess, analyse, and evaluate risk, and to develop strategies to continually improve risk management. The principles of our

framework are based on the international standard in risk management¹⁵ which support responding to the changing environment, transparency, and decision-making.

Our governance structure provides a strategic lens across the risk landscape. The Board, through its Audit and Risk Committee, require that ENZ has appropriate processes to manage potential and relevant risks and receive regular reports on the operation of risk management and internal controls.

The Board has identified the following key strategic risks:

Updated ENZ draft key strategic risks 2023/24

| | |
|----------------------------|---|
| ENZ Strategy | With <u>Te Tiriti</u> as our foundation, we will empower and connect the international education sector globally and partner for mutual economic, social and cultural benefits for Aotearoa New Zealand |
| Key strategic risks | <p>Reduced understanding and awareness of the social, cultural, and economic contribution of international education to New Zealand.</p> <p>ENZ does not meet its obligations for Crown/Māori relationships</p> <p>Unable to successfully deliver ENZ's strategy due to limited funding</p> <p>Unable to deliver on ENZ's Scholarships vision</p> <p>Ability to influence is limited by variable understanding of ENZ's role and responsibilities</p> |

We will monitor and report on strategic risks that have already been identified, so that we can respond to risk and continue to deliver our strategic objectives

To support the delivery of our strategic goals, over the next four years we will:

- regularly identify and monitor risk with the organisation, and report to the Senior Leadership Team, the Audit and Risk Committee, and the Board
- undertake activities, within the scope of our functions, to mitigate and manage identified risk
- revise, as necessary, the consequence and likelihood levels for any risk
- implement a new risk management rating matrix to support reporting of inherent and residual risk
- report any significant risks, and appropriate strategies to address them, to our Minister and our monitoring agencies as they arise.

¹⁵ International Standards Organisation (ISO) 31000:2009

Appendix One: Our statutory functions

ENZ's functions are specified in section 511 of the Education and Training Act 2020. Our statutory functions are to:

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

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