



**NEW ZEALAND
EDUCATION**
Manapou ki te Ao

E.48 (2025)

Statement of Intent 2025 - 2029

Education New Zealand

Manapou ki te Ao

Date 30 June 2025



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1. Foreword

International education fuels growth for New Zealand and directly contributes to and supports the Government's ambitions set out in the Going for Growth Plan. In the 2024 / 2025 financial year, international education contributed over \$3.6b¹ in direct export revenue to the local economy. New Zealand offers a unique international education experience including stability, high quality providers, and employable graduates. Amid the current global uncertainty, these qualities are highly attractive to students worldwide.

International education builds global skills and knowledge and creates networks between future leaders, in New Zealand and the world. It is this lifelong relationship between students and New Zealand that makes international education special. International alumni take their New Zealand experiences with them throughout their lives, amplifying New Zealand's impact around the world. The current environment offers New Zealand an opportunity to strengthen its position in the international education sector, with all the well-documented benefits that ensue. These benefits, with effects felt for generations, include people-to-people links, economic prosperity, talent development, global connectivity, and geopolitical influence.

By delivering on our strategic plan, we will support the Government achieving its goals of raising New Zealand's living standards, creating higher-paying jobs, and helping grow the economy.

Some information is withheld until the "plan to boost export education earnings" is launched.

We will demonstrate success by growing student numbers and revenue, growing in prompted awareness of New Zealand and influencing student preference for New Zealand as a study destination.

An ambitious work programme in New Zealand and offshore will further strengthen our current strategic direction. In New Zealand, we will continue to work collaboratively with education providers in their efforts to attract international students and offer detailed insights to help them focus on the opportunities that exist in high-potential markets.

Our marketing campaigns will be nuanced and targeted by market, underpinned by data and insights gathered from our market research and student surveys.

At the heart of our strategy is our people and the relationships that they maintain with the sector both within and beyond New Zealand's borders. By working collaboratively with our teams and partner agencies, we can provide insights and information to education organisations in New Zealand and build New Zealand's brand internationally.

¹ This value is based on the Statistics NZ Education Travel Services.



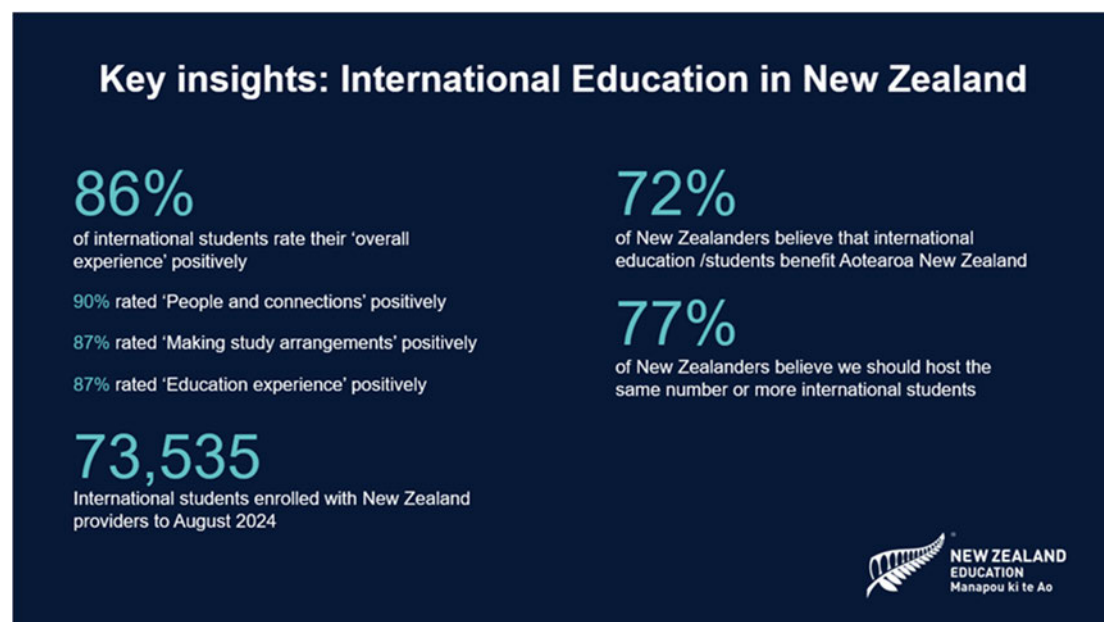
Thanks to their ongoing work and efforts, we are confident that we can deliver to our purpose: enabling a thriving and globally connected New Zealand through high quality education experiences.

Acting Board Chair
Tony Gray

27 June 2025

Board member
Daniel Wilson

27 June 2025



Data from Ministry of Education, International Student Enrolments 2024 (YTD August), Education New Zealand (2024) International Student Experience Survey, and Education New Zealand (2024) New Zealander's Perceptions of International Education Survey



2. Our Organisation

Our purpose

Education New Zealand Manapou ki to Ao aspires to take New Zealand's education experiences to the world and to build a thriving and globally connected New Zealand through high quality education experiences.

ENZ supports government goals of growing the New Zealand economy, strengthening communities, enhancing global connections, and fostering a skilled and adaptable workforce. International education drives export revenue, creates local jobs, and builds global skills and cultural competencies, greatly contributing to our local communities.

Importantly, international education contributes to New Zealand's diplomatic and trade relationships by fostering cultural exchange and building relationships between nations.

Our Goal

We will do this by raising awareness of New Zealand as a study destination for international students, influencing student choice through partnership and sector engagement, and fostering a high-performance culture amongst our team.

We will also support the delivery of education services offshore and continue to administer scholarships through delivering the Manaaki New Zealand Scholarships Programme.

International education is one of New Zealand's key export revenue-generating sectors, generating high-paying jobs, supporting the labour market, attracting and retaining global talent, and positioning New Zealand globally as a nation.

Our partners

We cannot deliver these ambitions alone. We work alongside other NZ Inc agencies, such as the Ministry of Foreign Affairs and Trade (MFAT), Immigration New Zealand, Tourism New Zealand, and New Zealand Trade and Enterprise (NZTE), to grow the value of international education and raise New Zealand's profile in our key markets.

We maintain strong connections to our monitoring agency, the Ministry of Education (MoE), to ensure our organisational focus supports the sector to thrive.

We work with a diverse range of schools, including English language schools, Private Training Establishments (PTE), Wānanga, Universities, New Zealand Institutes of Technology/Polytechnics (NZIST), and other institutions and companies in New Zealand contributing to the growth and delivery of export education.

Finally, we support international students and the international education sector onshore and offshore. We engage with international students at all stages of their journey, from their early aspirations of studying in New Zealand to their success as alumni worldwide.

Supporting wider Government objectives

The Manaaki New Zealand Scholarships Programme, a partnership between ENZ and the Ministry of Foreign Affairs and Trade, enhances international education relationships with partners from developing countries and fosters closer connections with scholarship partners and tertiary education providers. The programme serves as a significant lever to help achieve the Government's broader diplomatic and trade goals.

The programme delivers scholarships that are responsive to development partner needs, bridging local skill gaps and building relationships. The scholarships build individuals' knowledge and skills, enabling them to contribute to the social and economic development of their home country or country of choice upon completion of their scholarship.

Our structure and governance

ENZ is a Crown Agent under Schedule 1 of the Crown Entities Act and is governed by a Board appointed by the Minister of Education. As a Crown entity, we operate in accordance with the Crown Entities Act 2004 and the Public Finance Act 1989.

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 international education challenges and opportunities.

Our Board members bring a wealth of education, marketing, and international business expertise to ENZ.

Our staff

We have approximately 89 staff in 15 locations around the world. In New Zealand, we have offices in Wellington and Auckland.

Our offshore staff are generally co-located with other government agencies in New Zealand Embassies and High Commissions. Our offshore staff broker key relationships connecting New Zealand education to the world, leading in-market initiatives, gathering market intelligence and promoting New Zealand education to prospective international students, education agents and other governments.

Our team's ongoing engagement in key markets underpins our strategy and is essential to achieving our goals.



What we do

ENZ's functions are outlined under section 511 of the Education and Training Act 2020. We are responsible for:



Promoting New Zealand education offshore

- 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 internationally.

Managing international education activities for the Government

- 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
- Administer any international programmes or activities that are consistent with the Government's policy on international education
- Work with other agencies to ensure international students are adequately supported while living and studying in New Zealand.

Undertaking research and advice

- Carry out research on international education markets and marketing strategies
- Provide information, advice, and assistance to providers on strategies to promote industry coordination and professional development.

Providing information to international students in New Zealand

- Provide information to international students about living and studying in New Zealand
- Foster collaborative networks with former international students.

We summarise our legislated functions into two core functions:

- To raise awareness of New Zealand as a study destination through outstanding marketing and promotion
- To influence student choice through our onshore and offshore partnering and sector engagement.

As a Crown Agent, we also give effect to the Government's broader priorities and continue to adhere to the expectations outlined in the Enduring Letter of Expectations around delivering better results and improved public services for New Zealanders, while managing within tight fiscal constraints.

Going for growth

Going For Growth sets out the Government's approach to making New Zealand's economy grow faster, increasing living standards and opportunities for all New Zealanders.

[REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]

ENZ must manage resources judiciously to ensure our activities deliver the maximum return on investment. In the immediate future, ENZ will work intensively in those markets with the highest potential to grow or where we can continue to leverage our strong brand presence.

The growth of the international education market is underpinned by New Zealand's international reputation as a country and society. Over many years, we have developed global connections that have led to international consumers and businesses willing to buy from, study in, invest in and visit New Zealand.

Our funding

We are funded through the International Education Programmes appropriation - Vote Tertiary Education. We also receive funding from Vote Foreign Affairs to administer the Manaaki New Zealand Scholarships Programme.

3. Our operating environment

The global environment

New Zealand has a long history of attracting students worldwide, but the global international education landscape is highly competitive. We are competing against numerous other countries with their own marketing and promotional programmes.

There is growing interest worldwide in undertaking international study, and research indicates that international student mobility is set to increase.

Our reputation for being a high-quality education destination is enhanced by the fact that all New Zealand universities are in the top 2% globally (QS World University Rankings). This, combined with our open and welcoming communities, democratic society, enviable lifestyle and environment, is an attractive proposition for students seeking an international education experience in an English-speaking and bi-cultural country.

However, prospective students' choices are influenced by global economic and geopolitical conditions, and government migration and visa policies. International students carefully weigh up their options to ensure they can complete their studies in the country of their choice. We know students who choose to study in New Zealand do so because of our attractive overall offering, including post-study work rights.

This dynamic landscape presents New Zealand with opportunities and challenges. We remain a highly desirable destination for many students; however, we need to adapt to the global environment and continue to offer a quality product that international students seek to invest in.

The big picture trends

Several global trends are impacting students' choices. These include global competitiveness, new market entrants, digital transformation, and geopolitical tensions.

Global competition is changing, with increasingly successful competitors in the Asia-Pacific region emerging, such as Malaysia and Singapore. New Zealand must work hard to achieve a competitive advantage and increase its market share for students who have many options on where to study.

International education was already entering a transitional period prior to COVID-19. The pandemic has accelerated the acceptance of digital education products and the ability for students to obtain high-quality qualifications without leaving their home country. However, these trends are not inevitable: according to the ICEF Monitor², 'for every student who goes abroad, there are another four who would like to study outside their home countries but are unable to do so.'

Meanwhile, increasing geopolitical tensions mean that students are considering a wider variety of study options. Prospective students, their families, and their influencers must now consider the fast-changing rules and regulations of some markets. This allows New Zealand to position itself as a global leader in international education.

² ICEF Monitor is a global dedicated market intelligence resource for the international education industry.

The New Zealand context

As of December 2024, international education contributed \$3.6 billion³³ to New Zealand's export growth, including \$1b in fees. This represented around 3.4 per cent of total goods and services exports while it also generated considerable tax revenue via GST and personal income tax. Since then, the number of international students in New Zealand has continued to grow, with some institutions' enrolments exceeding pre-pandemic levels.

However, post COVID-19, increases in enrolments has not been consistent across all subsectors. Universities have recovered the fastest, while the English Language and the NZIST subsectors remain below 2019 levels and are facing multiple challenges.



In the immediate future, ENZ will increase enrolments by working with providers and supporting organisations in New Zealand to sharpen their international focus.

A key priority in the coming years is to grow a strong pipeline of enrolments while supporting providers' ability to host international students, enabling high-quality experiences for international students.

We must also maintain social licence with our communities and providers to ensure that international students continue to add value to the vibrant, dynamic, and globally relevant student experience in New Zealand. We will continue to collaborate with providers and NZ Inc agencies (for example, the New Zealand Qualifications Authority) to identify and manage risks associated with growth.

ENZ will support organisations by ensuring they have research, insights, and data to support their plans for international expansion. Our offshore teams will actively support the sector by leveraging international diplomacy programmes, enhancing government-to-government international education relationships, and brokering key relationships connecting New Zealand education to the world.

The value of the student experience

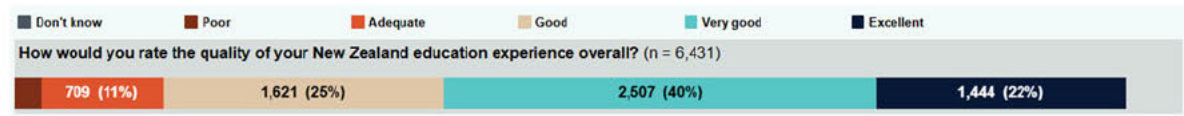
Every year, ENZ undertakes an International Student Experience Survey. This survey covers various topics relevant to the sector, including student decision-making, arrival and orientation, the education experience, living experience, people and connections, and perceptions of value for money.

Our earlier surveys demonstrate the value students see in a New Zealand education.

³³ This value is based on the Statistics NZ Education Travel Services.



ENZ will continue to measure these outcomes to ensure that, as a sector, we are meeting the expectations of students who come to New Zealand. The data and insights we gain from the survey are at the heart of our strategic plan.



Marketing New Zealand to the world

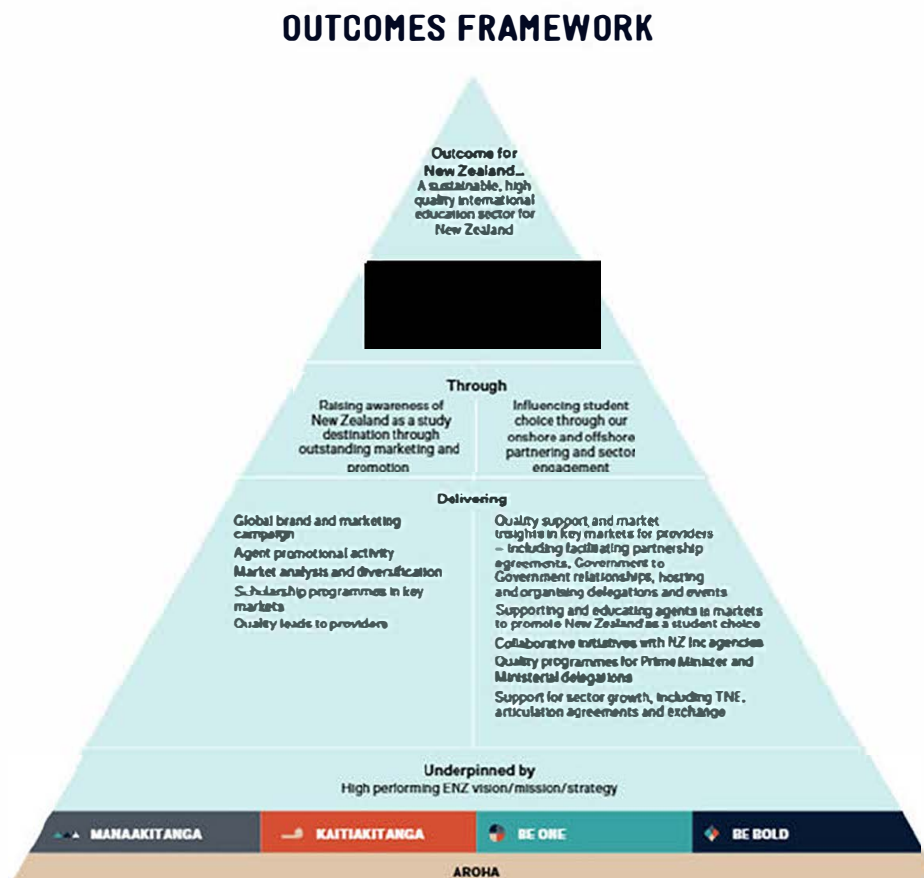
Our markets





4. Our long-term direction

Our long-term direction aligns with the Government's Going for Growth ambition as illustrated in the diagram below.



Our approach directly ties in with Government's objectives

following: We will do this through the

1. **Raising awareness of New Zealand as a study destination through strategic marketing and promotion**

A global brand and marketing campaign is at the heart of our international work. This promotes New Zealand education to key audiences through online and offline activities that showcase our distinctive brand and our quality education experience.



[REDACTED]

With a skilled team and strong presence across 15 locations worldwide and further connections beyond this, ENZ has in-depth knowledge that we will share with international education providers in New Zealand. Our staff also undertake detailed market analysis on a regular basis, sharing with organisations in New Zealand to support them in focusing on the right markets for their type of offering.

We deliver on this strategic goal by:

- Launching a high-profile global brand campaign that showcases New Zealand education's unique advantages, and raises awareness in key markets
- Developing and executing specific market plans under for each target country and education subsector
- Delivering more in-market events and experiences, including roadshows, delegations, fairs, and events that directly engage students, parents and influencers
- [REDACTED]

The key performance measures that will indicate success are:

- Increase in prompted awareness of New Zealand as a study destination, measured via an annual brand health survey. This is an indicator of marketing impact in building brand awareness.
- Increase the proportion of prospective students rating New Zealand among their top 3 choices of study destination, measures via annual brand health survey. [REDACTED]
- Lead generation, measured via engagement with our website Study with NZ and post-event connections. This indicator demonstrates increasing awareness and preference which can be converted into enrolment. It also supports agent facilitation activities in-market.

2. Influencing student choice through our onshore and offshore partnering and sector engagement

International students have more choices than ever before. New Zealand is competing on the global stage against larger, wealthier markets, many of which are geographically closer to students' homes.

Therefore, we need to be smart in promoting New Zealand and ensuring our education organisations are ready and able to support the growth in student numbers. This includes understanding what drives students to make their choices and ensuring we reach them when they are looking for information on studying.

To help achieve our goals we are working with other government agencies to ensure policy settings are welcoming and we open the door to New Zealand for genuine students.

We will deliver on this strategic goal by:

- Providing quality support and market insights in key markets for providers, including facilitating partnership agreements and fostering government-to-government relationships



- Supporting and educating agents in markets to promote New Zealand as an education destination, influencing student choice
- [REDACTED]
- [REDACTED]
- Collaborative initiatives with NZ Inc agencies, including leveraging opportunities to promote New Zealand unique offerings
- Developing an ENZ market intelligence platform to provide education providers with up-to-date information on data and trends
- Promoting New Zealand's high-quality offering and education experience through identifying quality programmes for Prime Minister and Ministerial delegations
- [REDACTED]

Building new and strengthen existing international government to government relationships and connections (in partnership with MoE and MFAT)

The key performance measures that will indicate success are:

- Measurement of ENZ's international education and insights value via social license survey and student experience surveys
- Measurement of event satisfaction levels via experience surveys at events where appropriate
- Percentage of payments ENZ makes to tertiary education institutions for the Manaaki New Zealand Scholarships Programme made within agreed timeframes
- Measurement of provider satisfaction with ENZ's services via an annual sector survey. This is an indicator of whether ENZ's activities are valued by the sector and seen as effective for encouraging growth.

3. Fostering a high-performing organisation

ENZ's core value offering is our people. Our team is global, and we support each other through our knowledge, work ethic, and passion for education.

We share five core values that are the same across continents and guide our actions and behaviours to create impact for our sector. These are Manaakitanga (care and reciprocity), Kaitiakitanga (stewardship), Be One, Be Bold, and Aroha.

Guided by these values, we will deliver on this strategic goal by:

- Creating a high-performing organisation that fosters a culture of productivity and high performance, enabling fast delivery at high quality
- Ensuring our organisational development activities are well aligned to our strategy and support the efficient and effective delivery of our activities
- Assessing the change in organisational culture following the 2024 restructuring, which aimed to establish a new functional model that emphasises a connected system and culture.

The key performance measures that will indicate success are:

- Measurement of staff perceptions of how their work contributes to the goals of ENZ via the six-monthly pulse survey⁴
- Measurement of staff perceptions pertaining to leadership and collaboration via the six-monthly pulse survey

It is fundamental to note that 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 all our people's talents. Our status as a good employer will be assessed against the elements and criteria the Human Rights Commission sets out.

Our staff engagement survey will inform the development and implementation of solutions for identified areas of improvement.

ENZ will also continue its commitment to delivering services aligned with our core functions such as communications, intelligence, marketing, capability, and market development services.

How our systems and technology contribute to achieving our goals

ENZ is a globally connected 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 capturing students' journeys to graduation.

We will work within the spirit of the whole-of-government directions for procurement, information and communications technology (ICT) and property to ensure we have efficient and effective back-office services.

Capital and asset management intentions

ENZ incurs minor capital expenditure for the lifecycle replacement of furniture, office equipment and computer hardware.

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

⁴ A six-monthly pulse survey that questions staff on how they perceive team collaboration, honest communication, behaviours, and motivations. Staff will also be asked questions around leadership, encouragement, and communication practices.



	Forecast (\$000)	Comment	Forecast 2025/26	Forecast 2026/27	Forecast 2027/28	Forecast 2028/29
Furniture and office equipment	149	Lifecycle replacement only	-	-	-	-
Computer hardware	24	Lifecycle replacement of hardware	90	90	90	90
Leasehold improvements and make-good	194	Auckland and Wellington premises	-	-	-	-
Intangible assets	187	Brand digital assets: Refreshed visual identity, videos, photography, other creative assets and documentation	-	-	-	-

Managing strategic and enterprise risks

We identify, manage and mitigate organisational and project risks using our risk management framework and in accordance with the Board's risk appetite. Risks and associated mitigations are monitored by ENZ's Board and its two sub-committees: the Audit Risk and Assurance and People, Culture, Safety and Wellbeing sub-committees.

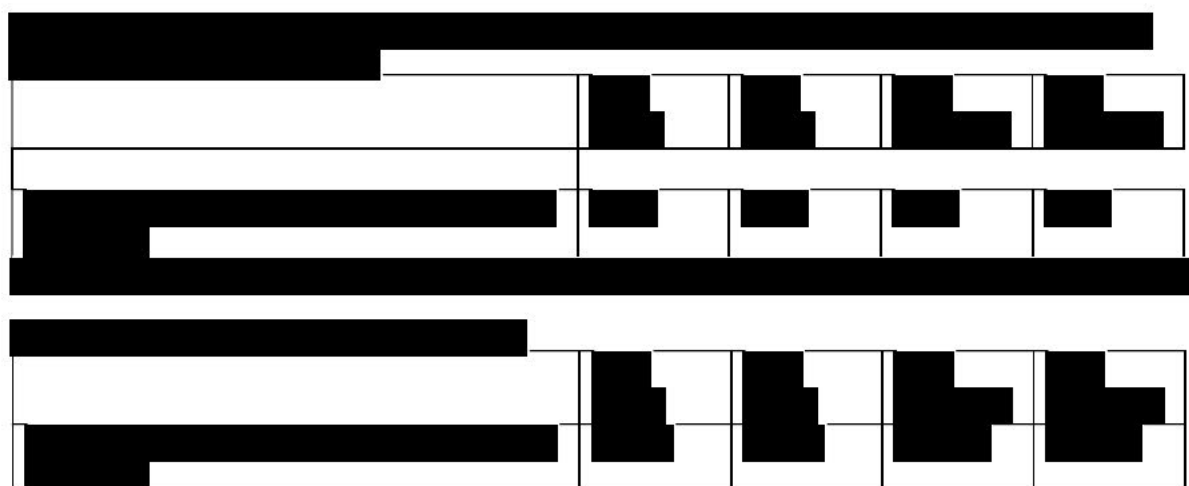
To support the delivery of our strategic goals, we will:

- continue to regularly identify, monitor and mitigate risks, and report to the Leadership Team and the Board and its sub-committees
- revise, as necessary, inherent and residual risk ratings
- report any significant risks, and appropriate strategies to address them, to our Minister and our monitoring agency, as these arise.

5. Assessing our performance

ENZ's performance framework is designed to measure how we market New Zealand offshore and how we support the growth of New Zealand international education and the economy.

Goal 1: Raising awareness of New Zealand as a study destination through outstanding marketing and promotion



Increase the proportion of prospective students rating New Zealand among their top three choices of study destination

2023/24 Actual	2024 Actual		
Not measured	18%		

Goal 2: Influencing student choice through our onshore and offshore partnering and engagement

Provider satisfaction with ENZ services: ENZ's support is valued by the international education sector

2023 Actual	2024 Target		
77%	75%		

Maintain a ratio of no less than 40% of ENZ staff based offshore in key markets to 60% located within NZ

2023	2024	2027	2034
Ratio of ENZ staff based offshore in key markets will be no less than 40%			



Goal 3: A high-performing organisation

ENZ staff understand how their work contributes to the goals of ENZ

2023	2024	2027	2034
Measured by six monthly staff pulse survey			

Leaders at ENZ promote team collaboration and focus on performance

2023	2024	2027	2034
Measured by six monthly staff pulse survey			

6. Appendices

Our Board

Tony Gray | Acting Board Chair



Tony Gray has had a career in education spanning over 37 years across New Zealand and the United Kingdom. Tony is a former Chief Executive of NMIT and Ara Institute of Technology.

He is currently the Chief Executive of Nelson Tasman Hospice Trust.

His governance portfolio includes Chair of the Tertiary Accord of New Zealand, where he worked towards establishing a shared online learning platform across member institutes.

Dr Therese Arseneau | Board Member



Dr Therese Arseneau has wide ranging governance experience including as Chair of the Board of ChristchurchNZ, Ara Institute of Canterbury, Regenerate Christchurch and Lane Neave and as a Director of J Ballantyne Company Ltd, The Open Polytechnic of New Zealand Ltd, Enterprise North Canterbury and the Social Sciences and Humanities Research Council of Canada.

Therese has over 30 years' experience in the tertiary education sector, including as a university lecturer in Canada and New Zealand. Therese holds a DPhil and MPhil from the University of Oxford, which she attended as an international student and Commonwealth Scholar.

Dr Erik Lithander | Board Member



Dr Erik Lithander has had a career in higher education spanning over 20 years across New Zealand, the United Kingdom, Ireland and Australia.

Dr Lithander is the Deputy Vice-Chancellor Strategic Engagement at the University of Auckland. Prior to this role, he was the Pro Vice-Chancellor and Vice-President (Global Engagement) at the University of Bristol in the United Kingdom.

Dr Lithander has an internationally focused governance portfolio, with oversight of the Auckland Confucius Institute and previously the North Asia Centre for Asia Pacific Excellence. He also is Chair of the Advisory Boards for the New Zealand Centre at the Indian Institute of Technology (Delhi).

Lyn Provost | Board member



Lyn Provost was Controller and Auditor-General from October 2009 until 2017. From 2001 to 2009 she was the first female and civilian Deputy Commissioner of New Zealand Police. Lyn recently completed a six year term on the International Auditing and Assurance Board.

In 2017, Lyn was made a Companion of the New Zealand Order of Merit for services to the State.

Dr Linda Sissons | Board Member



Dr Sissons has considerable experience in the tertiary and vocational education sector. Previously she was Chief Executive for the Universal College of Learning (UCOL), Taratahi Agricultural Training Centre, Wellington Institute of Technology, Hutt Valley Polytechnic and Primary ITO.

Recently, she completed two terms as Chair of the Board of Governors of Commonwealth of Learning, an intergovernmental agency delivering technology-mediated learning for sustainable development throughout the Commonwealth.

In 2006, Dr Sissons was made a Companion of the New Zealand Order of Merit for services to tertiary education.

Daniel Wilson | Board Member



After positions at several schools in Auckland and London, Daniel Wilson was appointed to the Leadership team at Manurewa High School in 2007, firstly as Deputy, then Associate Principal.

In 2015, Daniel moved to Nelson to take up the position of Principal at Nayland College. Daniel has extensive knowledge of international education from a secondary school perspective. Daniel is also the Lead Principal and Governance Chairperson for the Top of the South Trades Academy. Daniel has, and continues to work with various national and regional advisory groups.



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