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Education New Zealand Quarterly Report
1 October – 31 December 2022

Proactive Release



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Executive summary

International education providers are working to attract international students to study in New Zealand. This continues 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.

This report summarises the performance of Education New Zealand Manapou ki te Ao (ENZ) in delivering its strategic priorities during Quarter Two. These priorities have been determined in line with ENZ's strategic four-year plan and align with the *New Zealand International Education Strategy 2022-2030* (NZIES). ENZ's performance is assessed against ENZ's *Statement of Intent 2022-2026*, *Statement of Performance Expectations 2022/23*, *Business Plan 2022/23* and the *Letter of Expectations*.

In quarter two, our focus was on:

- Tono – Supporting Ministerial and Prime Ministerial travel to promote New Zealand
- Pono – Working with the sector to support diversification of products and services.
- Hono – Strengthening global citizenship through inbound and outbound scholarships.

Quarter two was a continuation of the work started in quarter one to promote New Zealand as “open for business”. During this quarter, we worked with the Ministry of Education (MoE) to support Minister Hipkins' travel to Asia in October, as well as travel by the then Prime Minister to Singapore and Japan, and then Viet Nam and Thailand closer to the end of the year. In addition to building on Ministerial presence in market, our marketing and campaign efforts were more targeted and locally focused than in quarter one.

We took on the operational management of the Ministry of Foreign Affairs and Trade's (MFAT) Manaaki New Zealand Scholarship Programme (MNZSP) and worked with Prime Minister's Scholarship recipients to support their travel. We also focused on building our capability to deliver on our goals and objectives, including strengthening our project management and business planning capability.

We worked with recipients of the Product Innovation Fund (PIF) to build a partnership management framework and understand how ENZ can support their innovation efforts. Just over \$1.6million in funding was awarded to seven PIF projects to explore, develop and test pilot projects of new products and services that could reimagine international education. We also completed part two of a pilot programme to deliver New Zealand education online.

Both are part of the wider Diversification of International Education Products and Services programme of work which is being funded through the COVID-19 Response and Recovery Fund (CRRF). Funding for the Diversification of International Education Products and Services programme finishes in June 2023 with a final report, including recommendations, due in September 2023.

As of 15 January 2023, there were approximately 25,000 valid student visas for New Zealand, compared to just under 17,000 on 31 July 2022. We expect the number of international students seeking to return or travel to New Zealand to increase in the coming months.

International education operating context

International education is rebounding across many countries. Traditional destination countries are seeing a resurgence in demand, and many are continuing to focus on incentives. COVID-19 appears to be less of a concern for students seeking an international education experience, although safety remains a focus. China's dropping of its zero-COVID policy and removal of border restrictions has been a significant change, given China is our top source country of international students. COVID-

19 related concerns are increasingly taking a back seat to the desire to resume international travel and face-to-face study, which is being encouraged by Chinese institutions and officials.

ENZ operating context

Strategic four-year plan

We are focused on delivering against our impact measures and performance measures for 2022/23, while also in the process of developing a new Statement of Intent for 2023-2027 and Statement of Performance Expectations 2023/24. We are working with the MoE on the new Statement of Intent.

ENZ delivery against Letter of Expectations

We have focused on strengthening our engagement and cooperation with other government agencies, including the New Zealand Qualifications Authority (NZQA), Immigration New Zealand (INZ) and others. During the quarter, we appointed two Māori Advisors in newly established roles, to help ensure ENZ is giving appropriate consideration to its Te Tiriti obligations. We have also worked closely with the MoE to improve transparency in our investments and operations.

Work completed in quarter two

This section outlines activities completed in the quarter, linking them to our strategic objectives and the NZIES.

Tono

Aotearoa New Zealand's unique education offerings and services are highly sought after by international learners

The work in this quarter continued to focus on:

- ensuring that our target markets know that New Zealand is open for business, strengthening existing relationships and building new connections,
- strengthening brand awareness through targeted marketing and communications, and
- supporting the sector to access key markets, build relationships, and tell the story of what New Zealand and New Zealand providers have to offer.

We delivered activities in line with the following strategic initiatives:

Deliver brand awareness, marketing and communications, and agent campaigns to drive preference for New Zealand

Prime Minister's visit to Viet Nam

ENZ worked with MoE to support the Prime Minister Ardern's visit to Viet Nam in November 2022, which included education representatives as part of the delegation. As well as signing an Education Cooperation Arrangement (ECA), education was mentioned in all bi-lateral meetings as an important pillar of the partnership with Viet Nam. A successful education roundtable with the Ministry of Education and Training (MoET) was also held.

Education Minister's visit to Korea, Indonesia and Singapore

ENZ worked with the MoE and MFAT to support Minister Hipkins' visit to South Korea, Indonesia and Singapore in October 2022. The visits were an opportunity to highlight that New Zealand is reconnecting with the world, increase the visibility of New Zealand's education offering, strengthen bilateral and education system connections, and boost the visibility of New Zealand as a preferred destination for international students in South Korea, Indonesia, and Singapore.

During engagements, Minister Hipkins highlighted New Zealand's unique, high-value education offering, met with counterparts to support bilateral relationships, and connected with alumni networks and New Zealanders, including Prime Minister's Scholarship students, based offshore.

The Minister also made clear that New Zealand valued the depth of the education relationship in each country and his interest in continuing these relationships.

Facilitate partnerships, events & other initiatives in target markets

KIWI Challenge Competition (Indonesia)

The KIWI Challenge (Indonesia) was officially launched by Minister Hipkins in Jakarta in October 2022, and the finals were held on Saturday 3 December 2022.

Participating students from schools across Java and Kalimantan were invited to provide an innovative solution or idea on an agreed theme. It started in 2020 as a way to maintain connections with offshore high schools and this was the third year of the competition.

This year's theme was Sustainable and Entrepreneurship in the Tourism Industry, which was chosen by the 2022 partner provider, Massey University. There were 36 video submissions from 18 schools across Java and Kalimantan regions. The winning school was BINUS School Serpong, an international school in South Tangerang, who presented a travel planning app that streamlines and personalises the travel planning process. The team also had a strong focus on local community engagement and inclusivity across people with different abilities. The prize for the students includes virtual internship opportunities with Massey University.

International Consultants for Education and Fairs (ICEF) Latin America

ENZ had a booth at ICEF Latin America, the largest international education event in Latin America. The event brings together education providers, government representatives and education agents from around the world to create connections and promote international education opportunities. ENZ promoted our Study with New Zealand website, MaiENZ, our information portal for education providers and agents, Latin America Masterclasses, and the ENZ Brazil LinkedIn page.

Australia International Education Conference (AIEC)

Several ENZ staff presented, virtually or in person, at AIEC in October 2022. The theme was 'Beyond Borders'. AIEC is the most significant international education conference in Australia and was attended by nearly 1,800 people. ENZ's presentations included:

- Student Experience: 'Taking the Aotearoa New Zealand student experience beyond borders'
- Global Citizenship: A panel together with Value Learning Australia explored the process for the development of monitoring and evaluation of global competences and how research was applied to inform practice
- Virtual Exchanges: Findings from a new international digital virtual exchange between South Korea and New Zealand.
- Scholarships: A virtual panel presented in partnership with TupuToa, and members of the Prime Minister's Scholarship Māori alumni group, Kahui Kaupapa, on increasing indigenous participation in outbound mobility programmes. This was the only panel across the conference that addressed indigenous inclusion.

Support provider re-engagement with international markets

China

Providers estimated 2,480 new and 3,680 returning students will look to travel to New Zealand for semester one in 2023. Although there are direct flights to Auckland from Shanghai, Guangzhou and Hong Kong, there is limited flight capacity in January/February 2023 due to the easing of border restrictions and an early Chinese New Year.

To assist students travelling from China to New Zealand for semester one, ENZ partnered with Air New Zealand and New Zealand education providers to secure block ticket bookings. ENZ opened the first of three rounds of expressions of interest (EOI) in early December and saw strong demand.

142 tickets were successfully allocated to students for flights out of Shanghai, across three rounds of seat releases. The majority of EOIs were received from university students.

India

- ENZ and New Zealand's eight universities hosted a 'Study in New Zealand' workshop for 20 high school counsellors in Lonavala, Maharashtra in September 2022. The workshop profiled all the New Zealand universities and supported the creation of a pipeline of undergraduates.
- ENZ met with the Associate Director, Global Engagement, Massey University in India. The visit was focused on re-connecting with stakeholders and supporting education agents. Massey has appointed a person in-market to manage local engagement with a special focus on agent relationships.
- A delegation from the University of Waikato (UoW) visited India in early November 2022. ENZ organised in-market meetings and identified potential new partnership opportunities. UoW announced the Vice Chancellor's International Excellent Scholarship, an exclusive scholarship package of NZ\$500,000 for Indian students during the visit.
- A University of Auckland (UoA) delegation was in India in November 2022. The visit focused on strengthening ties with UoA's existing partners and exploring mutually beneficial partnerships with leading Indian institutions in the areas of engineering and creative arts. The visit also included a meeting at the New Zealand Centre @ IIT Delhi. ENZ supported the visit by making connections, and organising meetings with Indian institutions and media.

Japan

- ENZ hosted eleven principals and international staff from Waseda University and its affiliated schools for a four-day familiarisation tour to Manawatū and Hawke's Bay in November 2022. The "famil" was co-funded by ENZ and Air New Zealand. Both regions helped organise visits to 14 education providers. Waseda University schools will send up to 60 students on a 21-day group programme to the two regions in March 2023. Waseda plans to increase the number of participants to 100 from 2024.
- A delegation from the Canterbury, led by Christchurch Educated, hosted a seminar and networking for Japanese agents and educators at the New Zealand Embassy in Tokyo in October, with support from ENZ. Christchurch Educated plans to return to Japan in 2023 as part of the 50th anniversary of its sister city relationship with Kurashiki City in Okayama.
- ENZ also hosted the Japan Stakeholder Reconnecting event at the New Zealand Embassy in Tokyo in October. Across the two days, 68 representatives from education and travel agencies, schools, universities and ENZ's education partners in Japan networked with 19 New Zealand education providers, regional representatives and one Edtech company, Chasing Time English.

Support the sector with accurate and timely intelligence

International Education Peak Body Forum

ENZ hosted the final international education Peak Body Forum for 2022 in November. Attendees included peak body representatives, INZ, Ministry of Business, Innovation and Employment (MBIE), MoE, and NZQA. Notable discussions at the meeting included:

- the message that New Zealand is 'open' needs to be continually emphasised and reinforced at every opportunity, especially in market
- concern about the availability of the homestay provision, particularly for schools and English language schools. It was agreed that there was a need for collective effort to raise the awareness of the benefits of hosting international students
- INZ presented on people trafficking and exploitation as it relates to international education. The discussion focused on the best ways of engaging with students to help keep them safe

- an update on the International Student Wellbeing fund. MoE is working through the criteria for this contestable fund. Possible themes for the use of the funding were building capability for providers as many have left the industry, and building connections between international students and communities as students have noted feeling isolated because of COVID-19.

The Insight Story

ENZ published The Insight Story (Issue 6) on Intellilab, our online research and insight portal, in early December 2022. The Insight Story is ENZ's data-based report of the international education sector. It is distributed to approximately 25,000 stakeholders, including New Zealand education providers, government agencies, education agents, and regional economic development agencies and is promoted to ENZ's LinkedIn followers.

Pono

Aotearoa New Zealand delivers high-quality and diverse education experiences that are sustainable, globally competitive and deliver value to all involved

The work in this quarter has focused on:

- supporting the sector to diversify the products and services on offer for offshore learners
- supporting a positive experience for international students in New Zealand.

Complete delivery of the CRRF diversification work programme

Product Innovation Fund

ENZ is working with PIF funding recipients to establish project plans and hypotheses for testing, and identifying areas where ENZ can provide additional support, such as international connections or market insight, to amplify the impact of funding. The PIF is part of the wider diversification work programme. A partnership management framework has been implemented to ensure that each project generates scalable learning and insights for the benefit of the wider sector.

In December, Ōtautahi/Christchurch-based PIF recipients attended an ENZ-run event designed to test and demonstrate the benefits of cohort-based innovation activity. Two PIF recipients who are also both New Zealand Trade and Enterprise (NZTE) clients are contributing to case studies. This will allow us to explore and understand the wider government support ecosystem and the complementarity of ENZ and NZTE support in taking innovative products and services into market.

Second FutureLearn Pilot and the New Zealand Owned Platform

The second pilot with FutureLearn has been completed. In combination with additional research commissioned by ENZ around behaviour and perceptions of adult online learners, insight from this second pilot has been incorporated into the design and planning for the New Zealand Owned Platform (NZOP) pilot.

Scoping and procurement for the NZOP pilot have been completed. Design and build of the platform have begun. The project is on track to launch in early 2023. To date, 19 providers have committed to participating and a good level of interest is being shown by a number of universities and Te Pūkenga subsidiaries.

New Zealand Education Centres (Offshore)

The New Zealand Education Centres initiative was paused in December to review the strategic alignment of the initiative. An evaluation of the project has been completed with a set of recommendations being developed for the internal ENZ Programme Governance Group to decide on the future direction of the project. The evaluation has also begun to identify wider strategic learning for inclusion in the final Programme Evaluation Report.

Student experience

Meeting with Auckland Agency Group

The Auckland Agency Group met on 21 November, the first in person meeting since May 2021. This group brings together representatives from central government agencies, Auckland Council, Te Whatu Ora, NZ Police, the New Zealand International Students' Association and Auckland-based student associations, to share information and highlight issues impacting international education and international students in Tāmaki Makaurau. Attendees identified an opportunity to tell the story of international education to recently elected local boards, as they bring together their plans for the next three years, and will work towards doing this.

Separately ENZ met with Inspector Grant Tetzlaff, Relieving District Commander, Auckland City, a representative of the New Zealand Police Ethnic Responsiveness Team, and consular representatives from India and Japan. These regular meetings focus on how we can each share information and resources to better support international students in Tāmaki Makaurau and explore areas of possible partnership. Constable Karimi from this team is currently engaging with Auckland education providers, delivering presentations to students (and planning for 2023) so they better understand the role NZ Police can play to support their experience living and studying in Auckland. The next meeting is planned for March 2023.

New Zealand International Youth Film Festival (NZIYFF)

The NZIYFF was held in the quarter. As part of ENZ's student experience activities ENZ sponsored the 'Best International Student Film' category at the inaugural NZIYFF. The festival, created by AUT international student Ryan Chow, is a wonderful showcase of talent and creativity across all aspects of film. It provides rangatahi aged 15 to 24 with a forum in which to share their stories and is an ideal opportunity to enrich connections between international students and New Zealanders. It is also a valuable platform to showcase what Aotearoa New Zealand can offer as a film and creative study destination.

Farewelling international students

Farewell events were held for 100 high school exchange students from Paraná in southern Brazil. This group had been in New Zealand since August 2022 for an international study experience. Events included:

- an ENZ/RotoruaNZ co-hosted lunch and fun activity day for students based at Western Heights High School
- a WellingtonNZ event at Te Auaha, attended by students based at Hutt Valley High School, Kapiti College and Paraparaumu College. The Brazilian Ambassador to New Zealand, H.E. Marcos de Souza Campos, spoke at the event
- an ENZ-hosted virtual farewell for students based in Canterbury, Havelock North and Invercargill. The New Zealand Ambassador to Brazil, H.E. Richard Prendergast, spoke, and representatives from the Brazilian Embassy in New Zealand and the Paraná State Government attended.

As part of the Cohort 4 border exemption group, 18 undergraduate students from the University of New Hampshire, Cornell University, University of Michigan, and Colorado State University presented their research at the end of a 15-week, residential semester programme with EcoQuest on the Firth of Thames, in partnership with University of New Hampshire.

Hono

Aotearoa New Zealand makes the best possible use of its international education expertise to improve educational outcomes, establish partnerships and grow global connections

In quarter two, we focused on:

- The Prime Minister's Scholarships for Asia and Latin America
- High level engagement offshore with a strong focus on government-to-government relationships

Develop and deliver scholarship strategy

Prime Minister's Scholarships for Asia and Latin America

Individual scholarship round

The selection panels for the individual Prime Minister's Scholarships for Asia and Latin America (PMSA, PMSLA) sat in October. Of the 110 PMSA applications, 74 were able to be supported (67%). For the PMSLA, 38 of 55 applicants were able to be supported (69%). All recipients except one accepted their offers of scholarship.

Recipients who identify as New Zealand Māori comprise 22% of PMSA recipients and 17% of PMSLA recipients. This is a significant increase compared to the 2016-2019 rounds. Across these two rounds 5% of PMSA recipients identified as Māori and 8% for PMSLA.

Of the individual awardees, 4 have completed their programmes, 14 are in country, 15 are due to travel during February with the remaining 80 yet to travel.

Group scholarship rounds

Of the 30 group programmes awarded in the April 2022 round, 10 have now completed their programme, 11 groups are in-country and 9 are yet to travel. Among those currently in-country is the first ever iwi group to travel – Te Piruru on a six-week customised internship programme to Japan with the Ainu people.

Of the 14 group programmes from the deferred August 2019 group round, 4 groups have completed their travel, one group is in Mexico and the remaining 9 groups are yet to travel.

Preparations are underway for launching the next group application round expected to go live on 6 March.

Asia NZ Foundation

The Asia NZ Foundation (ANZF) delivered three pre-departure sessions for groups travelling to Asia, one for Indonesia, one for Viet Nam and South Korea, and a third for Japan. The sessions have been incredibly well attended and received and are a good way for ENZ to ensure that participants feel both engaged with ENZ and ANZF as well as supported in their journey. ANZF offered the webinars for free to PMSA group recipients. We will continue to work with the foundation to ensure this initiative continues and benefits more recipients.

Manaaki New Zealand Scholarships Programme

ENZ took over the management of MNZSP in November following several months of transition from MFAT. There are now nine permanent staff, one fixed-term staff member and the temporary MFAT operations team in ENZ's Wellington office running the programme. The temporary team will be with ENZ until the end of March 2023 to ensure:

- key information about the programme is transferred to the permanent team
- the programme continues to operate through this transition phase
- the programme is effectively embedded within ENZ operations.

ENZ is aiming for a mid-2024 delivery of the new technological solution for scholar management that will enable the Future State to be realised as outlined in the jointly developed Operating Model.

Scholarships for German tertiary students

ENZ's "Welcome to New Zealand" campaign, run in partnership with not-for-profit scholarships platform MyStipendium, closed on 16 October. The scholarships were open to German tertiary students looking to study in New Zealand at bachelor's or master's level, for a semester or a full degree programme. ENZ received 338 applications. ENZ funded one full scholarship (€8,000) and four partial scholarships (€3,000 each). Having selected the winners, ENZ travelled to the university to award the scholarship to the winner and generated coverage on social media channels. We will do more work on social media when the students arrive in New Zealand in 2023.

Facilitate global connections

New Zealand-China 10th Joint Working Group (JWG) on Education and Training

Minister Hipkins opened the NZ-China 10th JWG with his Chinese counterpart, Minister Huai Jinpeng, on 22 November. The meeting marked 50 years of diplomatic relations between the two countries. It was the first time that Education Ministers and Ambassadors have provided opening remarks at the JWG, which is an important mechanism for supporting education cooperation and exchange with China.

There was positive feedback on the broad range of topics traversed and the value of the meeting from New Zealand participants. These included MoE, NZQA, ENZ and sector representatives from UNZ and Te Pūkenga.

An outcome of the meeting was the renewal of the Addendum to the New Zealand-China Arrangement on Cooperation in Education and Training, which covers a range of joint projects such as the New Zealand-China Tripartite Partnership Fund which opens for 2023 proposals this month.

Viet Nam–New Zealand Education Forum

UNZ, in association with the University of Waikato and ENZ, welcomed a senior delegation of Vietnamese government and education officials to the University of Waikato for an education forum on Monday 5 December. The delegation included President of the Vietnamese National Assembly (who met with Minister Hipkins on 6 December in Viet Nam) and Chairman of the Law Committee of the National Assembly.

This education forum was a valuable opportunity to strengthen institution-to-institution relationships and to demonstrate the importance of the education relationship between New Zealand and Viet Nam higher education institutions.

A MOU between UNZ and the Vietnamese Ministry of Education and Training (MoET) is still under review by MoET. We are hopeful this will be signed during a senior level, New Zealand university delegation visit to Viet Nam in March 2023.

Te Kāhui Amokura (TKA) delegation visit to Washington, DC

ENZ supported the TKA delegation visit to Washington, DC. The delegation consisted of:

- Professor Rawinia Higgins, Deputy Vice-Chancellor Māori at Victoria University of Wellington and current Chair and Commissioner of Te Taura Whiri i te Reo Māori (Māori Language Commission)
- Associate Professor Meegan Hall, Assistant Vice-Chancellor (Mātauranga Māori) at Victoria University of Wellington
- Fiona Johnson-Bell, Te Pouhāro Māori, Senior Manager - Māori Education System and Academic for Te Pōkai Tara (Universities New Zealand) and TKA.

During the visit the delegation met with a variety of organisations and people who are engaged in improving indigenous education exchange, as well as the National Science Foundation who indicated they would like to work with New Zealand and TKA to focus on STEM capability development in minority serving institutions.

Engagement with Omani Government

The New Zealand Ambassador in Riyadh made an accreditation visit to Oman during the quarter. With ENZ input, the education elements of his programme in Muscat included:

- a meeting with Dr Bakhit Al Mahri, Undersecretary of Higher Education at the Omani Ministry of Higher Education, Research and Innovation (MoHERI), who was very positive about prospects for the education relationship with New Zealand.
- a discussion with Dr Khalid Ambusaidi, Director General of Vocational Training at MoHERI
- a meeting with Khalid Al Shaqsi (until recently Director of External Scholarships at MoHERI) in his new role at the Royal Academy for Management. The Academy is a new initiative from the

Royal Palace to provide training for government officials and ministers. Al Shaqsi thought New Zealand might be a good partner to help the Academy deliver programmes.

- a reception for about 15 New Zealand university alumni, who appreciated the opportunity to renew their connections with New Zealand.

New Zealand Global Competence Certificate (NZGCC) graduation

The final cohort of NZGCC participants has graduated. More than 100 teachers from Malaysia, the Republic of Korea, Thailand and Viet Nam studied the NZGCC Educator version, specifically designed to support teachers to teach in multicultural settings and deliver on the United Nations Sustainable Development Goals.

This is the last of the 1,415 NZGCCs ENZ has delivered since late 2020 to students (domestic and international, high school and tertiary), and teachers (domestic and international), to grow global citizens, create social licence and to nurture strategic partnerships offshore while borders were closed.

Frankfurt Book Fair

ENZ and New Zealand's Ambassador to Germany, H.E. Craig Hawke, attended the Frankfurt Book Fair in October, meeting representatives from the Publisher Association New Zealand (PANZ). The Frankfurt Book Fair is the world's largest trade fair for books, based on the number of publishing companies represented. It is considered the most important book fair in the world for international deals and trading. Catriona Ferguson, Association Director PANZ, who organised the New Zealand presence, with funding from ENZ, and a networking event at the fair, noted the support from NZ Inc agencies and from the New Zealand Embassy.

New Zealand EdTech and Education Publishing community

ENZ met the National Schools Interoperability Program (NSIP) an agency of Education Services Australia at EduTech Australian in August to learn more about their Safer Technologies for Schools (ST4S) assessment.

ENZ arranged a webinar in October with NSIP and the MoE to discuss ST4S and what it means for New Zealand's education products and services sector. More than 45 New Zealand EdTech businesses, education publishers and schools attended, as well as ENZ, MoE and NZTE personnel.

MoE joined the ST4S initiative in late 2021 and is working with the Australian ST4S team to extend the scheme for use in New Zealand. The goal is to make ST4S assessment reports available to schools and kura in New Zealand to inform education technology selection and risk management.

Kono

ENZ's core capabilities nourish the organisation and support the delivery of all Strategic Objectives under the Four-year plan

Engagement with other agencies

International Education Chief Executives' group

The International Education Chief Executives' Group, established to have oversight of the COVID-19 Recovery Plan, participated in a facilitated workshop in December to review the value, role, purpose of the group with the refreshed NZIES signalling a shift from recovery to rebuild.

The group considered how best to support the delivery of the NZIES and strengthen international linkages into government's broader objectives such as its economic and trade related goals.

The outcomes from the workshop were:

- there is value in continuing to have an oversight role

- based on the discussion on the potential value of international education to New Zealand, the group agreed that the existing Economic Chief Executives' Forum would be a more appropriate and effective way to provide collective advice to Government
- that the international education portfolio be included in the Economic Chief Executives' programme
- that ENZ's Chief Executive be invited by the Chair of the Economic Chief Executives' forum to participate as a member of this forum.

These outcomes have implications for the existing governance structure and signals that it would be appropriate to disband the International Chief Executives' Group. Other decisions on the role of the Senior Officials Group in relation to the monitoring of delivering NZIES objectives are currently under discussion.

Agent engagement review

In June 2022 ENZ commissioned a review of the education agent landscape and ENZ's current activity in relation to agents. The review aims to help shape ENZ's future direction with agent engagement.

The MoE, INZ and NZQA provided input into the review. Education providers and education agents were interviewed, as well as internationally based ENZ staff. The report considers the international environment within which the sector operates, and the approach and activities that ENZ could undertake in relation to education agent engagement to provide value to New Zealand's international education sector.

Following feedback from ENZ, the draft report will be finalised in early 2023. ENZ will consider our approach to agent engagement and support once we have received the final report and recommendations. The future of the Education New Zealand Registered Agent (ENZRA) programme will be considered as part of this.

Rautaki Māori

Colombia

ENZ's Manukura (Chief Advisor, Māori), and Advisor, Rautaki Māori, supported the official re-launch of the New Zealand education brand in Colombia during the quarter. Colombia is the number one preferred country for New Zealand applicants of the PMSLA.

The ENZ Rautaki Māori team visited Gimnasio Moderno School, one of the most traditional and prestigious boys' schools in Colombia. They currently have 57 students in Canada and 20 in the United Kingdom on 16-week programmes and are looking to include New Zealand in the itinerary from 2023.

ENZ's Rautaki Māori and Latin America staff also launched the Lingogo project in Bogota which involved a partnership with IndieCollab, a Māori New Zealand EdTech company and Muysca indigenous communities.

IndieCollab specialises in creating bilingual indigenous stories as reading resources and distributing them digitally. These are the first quadrilingual digital book series to be launched in Colombia in Muysca, Māori, Spanish and English.

World Indigenous Peoples Conference on Education (WIPCE)

ENZ's Rautaki Senior Advisor attended the WIPCE in Adelaide in late September as part of ENZ's focus on building indigenous networks. This conference is a focal point for international indigenous scholarships, along with the connectivity of tertiary education around the world. Iwi/hapū Māori attended which provided opportunities to link ENZ Manapou ki te Ao to Māori education and educational providers.

Risks and Issues Management

To maintain high level oversight over ENZ's strategic objectives and manage risks and issues effectively, ENZ's strategic issues and key risks are regularly reviewed by the Audit and Risk Committee which provides independent assurance related to ENZ's strategic risks.

Financial performance to 31 December 2022

At the end of the first quarter ENZ's year-to-date surplus of \$2.179m was \$1.852m higher than year-to-date budget of \$0.327m. The year-to-date variances to budgeted expenditure are all timing-related and with two quarters to go we expect to meet our full year budget target.

STATEMENT OF FINANCIAL PERFORMANCE	For the 6 months to 31 December 2022		
\$000s	Actual 2022/23	Budget 2022/23	Actual 2021/22
Operating Revenue			
Revenue from the Crown - Operating	15,623	15,623	14,601
Revenue from the Crown - EEL	-	-	-
Other revenue	577	92	49
Total operating revenue	16,200	15,715	14,650
Scholarship Revenue			
Revenue from the Crown - scholarships	1,875	1,875	1,563
Total scholarship revenue	1,875	1,875	1,563
Operating Expenditure			
Personnel costs	7,805	7,875	6,323
Other expenses	6,982	7,773	6,529
Depreciation & amortisation expenses	115	115	97
Total operating expenditure	14,902	15,763	12,852
Scholarship expenditure			
Scholarship expenses	994	1,500	8
Total scholarship expenditure	994	1,500	8
Net surplus	2,179	327	3,353

STATEMENT OF FINANCIAL POSITION	As at 31 December 2022		
\$000s	Actual 2022/23	Budget 2022/23	Actual 2021/22
Assets			
Total current assets	8,189	5,761	8,948
Total non-current assets	197	87	332
Total assets	8,386	5,848	9,280
Liabilities			
Total current liabilities	3,104	3,050	2,910
Total non-current liabilities	207	-	218
Total liabilities	3,310	3,050	3,129
Net assets	5,076	2,798	6,151

STATEMENT OF CASH FLOW
\$000s
Cash flows from operating activities
Receipts from the Crown
Receipts from Other revenue
Payments to suppliers, employees and IRD
Net cash flow from operating activities
Cash flow from investing activities
Net increase/(decrease) in cash
Cash at the beginning of the year
Cash at the end of the quarter

For the 6 months to 31 December 2022		
Actual 2022/23	Budget 2022/23	Actual 2021/22
17,498	17,498	16,164
439	92	49
(18,073)	(17,148)	(12,763)
(136)	442	3,450
(4,500)	-	-
(4,636)	442	3,450
5,695	2,238	1,927
1,059	2,680	5,377

Term deposits of \$6.5m as at 31 December 2022 (\$2.0m: 30 September 2022) invested across two banks see table below.

Account & Bank	Maturity dates	% pa	% of total	\$m
Call - ANZ	On Call	3.55%	14.01%	1.059
Fixed – ANZ	Maturing on 27 March 2023	3.40%	39.69%	3.000
Fixed – ASB	Maturing on 13 June 2023	5.22%	46.30%	3.500
Total Cash at Bank and Term Deposits			100.00%	7.559

ENZ's Impact, Performance and Organisational measures

Impact measures

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On Track ¹	Comment
A. International student perceptions of education quality.	Increase	7.7 out of 10	7.7 out of 10		○	ENZ has contracted Kantar to conduct this survey for 2022/23 with results available in time for Q4 reporting.
B. Number of students studying towards a New Zealand qualification onshore and offshore ²	Establish baseline	N/A	N/A		○	This measure relies on enrolment data for the 2022 calendar year. This data will be available in 2023.
C. The economic value from New Zealand's international education sector. ³	Increase	\$3.03 billion	\$790m		○	In 2020/21, ENZ commissioned a Broader Impact Valuation for the international education sector which has projected \$790m as the contribution of international education to GDP for 2021/22. This result is reported in ENZ's Annual Report 2021/22. Enrolment data for 2022 will be available in 2023.
D. The international education sector diversifies its offerings for international students	Establish baseline	N/A	N/A		○	This measure relates to ENZ providing a set of recommendations by September 2023 in line with the conditions of its CRRF funding.
E. The percentage of the international education sector's economic value coming from outside New Zealand's top two markets.	Increase	53%	Not measured		○	The methodology for the Broader Impact Valuation did not provide a value per market, and therefore this measure was not calculated or reported for 2021/22.
F. The percentage of international students enrolled to study outside Auckland. ⁴	Increase	50%	50.3%		○	This result is based on enrolment data. Enrolment data for 2022 will be available in 2023.
G. The percentage of international students who were satisfied or very satisfied with their overall experience. ⁵	Establish baseline	85%	Not a comparable measure		○	ENZ has renewed its contract for delivery and plans to undertake the survey in March/April 2023. We expect the results will be available in time for Q4 and full year reporting. We are currently reviewing the survey questions.
H. New Zealand institutions have improved quality of connections with international partners in key markets	Establish baseline	N/A	N/A		○	The methodology for this measure is currently being finalised.
I. Increase in participation in the Prime Minister's Scholarships for Asia and Latin America by Māori and Pasifika	Establish baseline	N/A	N/A		○	This measure will be reported at the end of the 2022/23 financial year.

¹ Key: ✓ on track to achieve full year target ✗ not on track to achieve full year target ○ Not measured in this quarter but expects to be reported in Q4.

² This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2022/23. A new baseline is to be established in 2022/23.

³ This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2022/23. The target in the Vote Tertiary Education Estimates 2021/22 was \$1.200million

⁴ This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2022/23. The target in the Vote Tertiary Education Estimates 2021/22 was to at least maintain the 2021/22 percentage.

⁵ This measure is also reporting on the end of year performance information set out in the Vote Tertiary Education Estimates 2022/23. The target in the Vote Tertiary Education Estimates 2021/22 was to have an increase from 2021/22 result.

Performance measures

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On track	Comment
Percentage of Active Visits on ENZ's studywithnewzealand.govt.nz website. ⁶	≥ 75%	N/A	N/A	29.60%	✘	This result has been impacted by a data error caused by many active visit events not 'firing' based on time on the page. This error was identified and fixed on 8 December but has significantly impacted the result between 1 July and 8 December 2022. Unfortunately, we are unable to retrospectively collect this information. Active Visits sit at 65.8% between December 8 and December 31, 2022. Additionally, the result has been impacted by the shift in website URLs from Study in New Zealand to Study with New Zealand impacting our campaign effectiveness, particularly in SEO and SEM.
Deliver recommendations on diversified products and services per CRRF funding requirements	Draft report completed by June 2023	N/A	N/A		✓	ENZ is on track to complete its work programme and deliver its recommendations by the end of the 2022/23 financial year. Under the New Products and Services workstream, Product Innovation Fund recipients have progressed their respective projects and Stage 2 funding has been released in all relevant cases, indicating that projects are on track. One recipient is still finalising its Stage 1 report. Under the Modes of Delivery workstream, the scoping and procurement for the New Zealand Owned Platform has been completed, and work on building the platform is underway and on target for a March 2023 launch.
Number of impactful global connections to New Zealand providers in key markets. ⁷	Establish baseline	N/A	N/A		○	The methodology for this measure is currently being finalised.
Supporting the rebuild of the international education sector by leading the implementation of the government's Strategic Recovery Plan's 'Transforming to a more sustainable future state' workstream, with:						
- Improved confidence and resilience within the international education sector ^{8,9}	Achieved	N/A	N/A		○	We have refined some of the questions that are included in the Industry survey to capture sentiment around confidence and resilience. We plan to undertake the survey in Q4 and report the findings in ENZ's Annual Report for 2022/23.
- facilitating cross-government collaboration via the Chief Executives' Group and strengthening links with international Ministers ¹⁰	Achieved	N/A	4 meetings		✓	One meeting scheduled and delivered for this period. Further commentary on this meeting is included in the body of this report.

⁶ 'Active visits' are defined as those where the visitor engages with the website content, e.g. clicking links, scrolling and viewing multiple pages or video. It is considered a measure of both the quality of the traffic to the website and the quality of the content on the website.

⁷ ENZ defines an 'impactful global connection' through a framework that accounts for reciprocity, a clear student, academic or research exchange or benefit, timeframe for potential outcomes of the connection and potential economic value to the institution and/or New Zealand.

⁸ This measure is intended to reflect ENZ's role in leading the 'Transforming to a more sustainable future state' workstream as set out in the Recovery Plan. ENZ works with the sector to support a diversified international education sector. surveys the international education sector annually to understand the current state of sector performance. As a result of COVID-19, Education New Zealand will specifically include questions about capacity and capability, as well as confidence.

⁹ This result also reports on a measure from the 2022/23 Estimate of Appropriation

¹⁰ This result also reports on a measure from the 2022/23 Estimate of Appropriation

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On track	Comment
The percentage of facilitated customers that agree ENZ's services and support have added value to their organisation. ^{11 12}	≥ 85%	N/A	82%		○	We have refined some of the questions that are included in the Industry survey to capture sentiment around confidence and resilience. We plan to undertake the survey in Q4 and report the findings in ENZ's Annual Report for 2022/23.
The percentage of users satisfied with the information and intelligence provided by ENZ	≥ 87% of users rate it as good or higher	N/A	83%		○	We have refined some of the questions that are included in the Industry survey to capture sentiment around confidence and resilience. We plan to undertake the survey in Q4 and report the findings in ENZ's Annual Report for 2022/23.

Organisational capability

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On track	Comment
J. ENZ staff have undertaken te reo Māori and cultural training	Establish a baseline	N/A	N/A	74	✓	As of the beginning of December 2022, 74 staff had completed courses 1-4 of Te Rito cultural training. This is from a headcount of 94 staff and accounts for staff changes over the quarter. Staff will begin courses 5-7 in January 2023.
Decrease ENZ's gross carbon emissions ¹³	Establish a baseline	N/A	N/A		○	ENZ is working with CNGP and is consulting with similarly sized agencies to understand how changes can be implemented, so that when the baseline gross carbon emissions are reported, we are in a position to implement improvements.

¹¹ 'Facilitated customers' are large education providers, peak bodies and regional partners that ENZ business development managers work actively with to provide growth-focused services and targeted support.

¹² This result also reports on a measure from the 2022/23 Estimate of Appropriation

¹³ ENZ will set a gross emissions reduction target for 2025 and 2030 consistent with a 1.5 degree pathway, measured against 2022/23 as a base year and based on ENZ's reduction potential.

Glossary

ANZF	Asia NZ Foundation
AIEC	Australia International Education Conference
CRRF	COVID-19 Response and Recovery Fund
EdTech	education technology
ECA	Education Cooperation Arrangement
ENZ	Education New Zealand Manapou ki te Ao
ENZRA	Education New Zealand Registered Agent
EOI	expressions of interest
ICEF	International Consultants for Education and Fairs
INZ	Immigration New Zealand
JWG	Joint Working Group
MNZSP	Manaaki New Zealand Scholarships Programme
MoU	Memorandum of Understanding
MBIE	Ministry of Business, Innovation and Employment
MoE	Ministry of Education
MFAT	Ministry of Foreign Affairs and Trade
MoET	Ministry of Education and Training, Viet Nam
NZGCC	New Zealand Global Competence Certificate
MoHERI	Ministry of Higher Education, Research and Innovation, Oman
NSIP	National Schools Interoperability Program
NZIES	New Zealand International Education Strategy 2022-2030
NZIYFF	New Zealand International Youth Film Festival
NZOP	New Zealand Owned Platform
NZQA	New Zealand Qualifications Authority
NZTE	New Zealand Trade and Enterprise
PMSA, PMSLA	Prime Minister's Scholarships for Asia and Latin America
PIF	Product Innovation Fund
PANZ	Publisher Association New Zealand
ST4S	Safer Technologies for Schools
STEM	Science, technology, engineering and mathematics
TKA	Te Kāhui Amokura
UNZ	Universities New Zealand
UoA	University of Auckland
UoW	University of Waikato
WIPCE	World Indigenous Peoples Conference on Education

Proactive Release