



# ITP SECTOR STRATEGIC ROADMAP

Final Summary

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Disclaimer: The views and opinions expressed in this document are solely those of the author and/or the contributors and do not necessarily represent the views of Education New Zealand.

Gate	Departures	Time
A2	AUCKLAND	09:45
B2	DUBAI	10:15
B1	GENEVA	10:50
C2	NEW YORK	11:00
A2	HONG KONG	11:20
B2	SEOUL	11:45
A1	KUALA LUMPUR	12:00
B3	LONDON	12:25



# FOREWORD

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The Leadership Statement for International Education was released in September 2011 – setting targets that include doubling the economic value of international education to \$5 billion by 2025.

The Leadership Statement outlined proposed actions for achieving this target, based on trends and predictions at that time. We all know that the international education market has changed – emerging student markets, the increasingly important role of technology, new competitors and products, and different expectations about how and when learning and assessment will take place. Commentators agree that this pace of change will continue.

There is also agreement that globally the number of students seeking an international education experience by 2025 will be in the region of 8 to 9 million and that there are many opportunities to grow and succeed if our education packages are flexible and able to continue to meet student expectations. This is at the heart of the roadmaps process. How does each segment of the industry need to position itself to respond to new opportunities and challenges and what is the industry's view of success in 2025?

**“The next step is to ensure that this industry view is reflected in government and industry planning documents....”**

I've been heartened by the way the industry has embraced the roadmaps development process. Each sector's roadmap process has been led by a respected person from that sector and over 400 industry participants have directly had input into this product: either through workshops, interviews or questionnaires.

The next step is to ensure that this industry view is reflected in government and industry planning documents to provide a meaningful way ahead for individuals, businesses and agencies. I look forward to working with you all to make this happen.



**Grant McPherson**  
Chief Executive  
Education New Zealand



# OVERVIEW — HOW THIS ROADMAP WAS DEVELOPED

The development of a roadmap for the Institutes of Technology & Polytechnics (ITP) sector of New Zealand's international education industry has been facilitated by Education New Zealand as part of developing an overarching international education industry roadmap.

The process for developing an international education industry strategic roadmap commenced in early December 2013 and has involved a team of independent Project Managers working with key sector advisors and international education providers to produce a roadmap for their respective sectors via:

- > 10 sector-based roadmap development workshops held in Auckland, Wellington and Christchurch with over 370 industry participants
- > 117 in-depth interviews with key industry participants

- > Analysis of nearly 220 opportunities for industry growth
- > 7 regional 'test drive' workshops held in Auckland, Hamilton, Wellington, Christchurch, and Dunedin with over 200 industry participants

This sector roadmap should be read in conjunction with the following related sector documents:

1. ITP Sector Discussion Paper
2. ITP Sector Roadmap Workshop Outcomes & Key Themes
3. ITP Sector Interview Summary
4. Innovation Café Discussion Paper
5. Innovation Café Workshop Outcomes & Key Themes



# PURPOSE

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This roadmap has been developed by the ITP sector of New Zealand's international education industry to guide its future growth and success towards 2025.

The roadmap contains a number of 'strategic choices' and 'specific actions' which have been identified as key enablers of future success.

It is important that the strategic choices contained in the roadmaps are seen as just that – *choices*. They may only be relevant to some providers, either individually or as groups, or in conjunction with government or the private sector.

# DESTINATION 2025

		CURRENT	2025 SCENARIO 1	2025 SCENARIO 2
<b>PARTICIPATION</b>	Number of international education providers	18	18	18*
<b>ENROLMENT</b>	Students**	12,377	18,702	22,227
	Average students per ITP	632	1,039	1,235
<b>VALUE</b>	Tuition fee income	\$100m	\$221m	\$295m
	Tuition fees per student	\$7,968	\$11,817	\$13,267
	EVA	\$304m	\$609m	\$757m

\*Assumes consolidation in the sector with regional and strategic mergers. Smaller campuses would remain.

\*\*Includes onshore and offshore students.

# DESTINATION 2025

## – THE NUMBERS EXPLAINED

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### Scenario 1 assumes:

- > An annual student growth rate of 3.5% from 2013
- > A compound annual fee increase of 3.0% from 2013
- > An inflation rate of 1.5% from 2013
- > The EVA is the sum of tuition fee revenue and living costs per student
- > The 2012 “tuition per student” was sourced from the Economic Impact of International Education 2012/13 report (EVA). It is based on the total annual tuition income generated for that sector and divided by the number of students in that sector.
- > The 2012 living cost per student was sourced from the EVA. This value was derived from surveying students for 12 months and determining their annualised living cost while studying New Zealand. It included costs such as accommodation, utilities, books and other costs associated with living in New Zealand. Based on the results from the survey, an average living cost per student (in each sector) was estimated in the EVA.

### Scenario 2 assumes:

- > An annual student growth rate of 5.0% from 2013
- > A compound annual fee increase of 4.0% from 2013
- > An inflation rate of 1.5% from 2013
- > The EVA is the sum of tuition fee revenue and living costs per student
- > The 2012 “tuition per student” was sourced from the Economic Impact of International Education 2012/13 report (EVA). It is based on the total annual tuition income generated for that sector and divided by the number of students in that sector.
- > The 2012 living cost per student was sourced from the EVA. This value was derived from surveying students for 12 months and determining their annualised living cost while studying New Zealand. It included costs such as accommodation, utilities, books and other costs associated with living in New Zealand. Based on the results from the survey, an average living cost per student (in each sector) was estimated in the EVA.

# DESTINATION 2025

	Current	Destination 2025
<b>Markets</b>	<ul style="list-style-type: none"> <li>&gt; Reliance on two markets, India and China</li> <li>&gt; Fragmented development of smaller niche markets</li> <li>&gt; Products and USP generally weak</li> <li>&gt; Individual marketing and recruitment</li> <li>&gt; Limited long-term investment</li> </ul>	<ul style="list-style-type: none"> <li>&gt; All markets segmented, understood and prioritised</li> <li>&gt; Focus on market share from lead New Zealand GDP sectors</li> <li>&gt; Product and positioning to maximise financial return</li> <li>&gt; Value-added packaging which maximises profits</li> <li>&gt; Sector committed to long-term investment strategy</li> </ul>
<b>Products &amp; Pathways</b>	<ul style="list-style-type: none"> <li>&gt; Domestic products targeted at international market</li> <li>&gt; Sector 'brand' not recognised offshore</li> <li>&gt; Bulk of products offered at L5 – L7</li> <li>&gt; Employment pathways ad hoc and disconnected</li> <li>&gt; Limited offshore provision</li> </ul>	<ul style="list-style-type: none"> <li>&gt; International and market focussed products and services</li> <li>&gt; International brand with high recognition</li> <li>&gt; Blended delivery across many levels</li> <li>&gt; Employment pathways recognise market needs</li> <li>&gt; Comprehensive offshore provision and consultancy</li> </ul>
<b>Resourcing</b>	<ul style="list-style-type: none"> <li>&gt; Limited capacity and capability to respond</li> <li>&gt; Many consortia broker opportunities for the sector</li> <li>&gt; Infrastructure under-developed for International Ed</li> <li>&gt; Emergence of regional partnership and economies</li> <li>&gt; Centralised team within organisations responsible</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Capability and capacity for rapid response</li> <li>&gt; Single peak body maximising competitive response</li> <li>&gt; Infrastructure needs fully addressed</li> <li>&gt; Regions and industries providing unique packages</li> <li>&gt; Organisations integrated and internationalised</li> </ul>
<b>Capability &amp; Leadership</b>	<ul style="list-style-type: none"> <li>&gt; Core data and market intelligence disbursed</li> <li>&gt; Limited understanding of competitor activity</li> <li>&gt; Sector consortium collaborations are young</li> <li>&gt; Professional development limited</li> <li>&gt; Pockets of expertise in and across organisations</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Up-to-date market intelligence and data</li> <li>&gt; Best practice adopted and enhanced</li> <li>&gt; Peak body improving productivity for the sector</li> <li>&gt; Deep understanding of workforce training</li> <li>&gt; Succession planning clear and consistent</li> </ul>
<b>Partnership</b>	<ul style="list-style-type: none"> <li>&gt; Emergence of co-operative partnerships</li> <li>&gt; Ad hoc partnerships with employment providers</li> <li>&gt; Private sector investment untapped</li> <li>&gt; Education pathway restricted and qualification based</li> <li>&gt; All of Government approach in infancy</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Multi-sectorial groupings for offshore services</li> <li>&gt; Sector provides work experience and placements</li> <li>&gt; Significant public private partnerships</li> <li>&gt; Seamless transition through an integrated information system</li> <li>&gt; Integrated government agencies maximising value</li> </ul>

# INDUSTRY ROADMAP STRATEGIC THEMES

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Markets

Products and  
Pathways

Resourcing

Capability  
and  
Leadership

Partnership

# MARKETS OVERVIEW

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To achieve transformational growth to meet the target of doubling economic value by 2025, we will leverage the New Zealand Inc. brand through New Zealand's unique selling points in our own regions and to each provider's strengths.

We will add new and strengthen existing in-market relationships and leverage from our alumni and business / employer networks.

We will tell the New Zealand Vocational Education and Training story to a larger audience, within targeted employment sectors and priority markets to gain early wins.

We will use market intelligence better to understand the needs of the customers and strengthen face-to-face relationships via digital channels to engage our defined audience.

# STRATEGIC CHOICES — MARKETS

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**1**

Develop a NZ VET story to promote the strengths of our system

**2**

Use offshore alumni as New Zealand education ambassadors

**3**

Create and share relevant and timely market research and intelligence

**4**

Strengthen all channels to market by developing more digital channels and blended delivery

# MARKETS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	<b>Develop a NZ VET story to promote the strengths of our system</b>	Develop a strong NZ VET story aligned to the New Zealand Education story that highlights the collective attributes and competitive advantages of our ITP system	■	■	■
		Promote institutional and city brands within that collective story and adapt that story to different markets	■	■	■
		Rename "Institutes of Technology and Polytechnics", e.g. Colleges and Institutes New Zealand, to achieve greater international recognition	■	■	■
2	<b>Use offshore alumni as New Zealand education ambassadors</b>	Develop common NZ Inc. alumni tracking to maintain sector-wide contact	■		
		Involve alumni in NZ Inc. marketing to enhance in-market relationships	■	■	
3	<b>Create and share relevant and timely market research and intelligence</b>	Develop sector information channels across sector stakeholders for information sharing	■	■	■
		Produce regular reports on significant market opportunities and competitor behaviour to inform product development and mitigating actions	■	■	■
4	<b>Strengthen all channels to market by developing more digital channels and blended delivery</b>	Increase skills in digital marketing solutions to make digital media use as a core competency of VET marketing	■		
		Strengthen international marketing and business development teams to embed capability in New Zealand	■		

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

# PRODUCTS AND PATHWAYS OVERVIEW

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High quality, niche vocational education products will be developed that meet the future skill needs of global students, in fields where New Zealand can grow its competitive advantages to achieve greater relevance of products.

Delivery will be more diversified, including the use of offshore and blended learning. We will strengthen pathways from secondary to tertiary education and on to employment and residency to increase value propositions.

We will standardise best practice and work collaboratively with employers and ITOs across New Zealand's priority economic sectors, enhancing the quality of student experience and learning support as well as pathways to employment and greater career prospects.

# STRATEGIC CHOICES – PRODUCTS AND PATHWAYS

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1

Develop VET programmes and services that align with New Zealand's unique attributes and market needs

2

Diversify products while increasing blended learning including offering dual badged qualifications

3

Strengthen pathways across New Zealand's education system and into employment and residency

4

Increase the value of our graduates by adopting and embedding technology and applied science from industry

5

Build and credentialise qualifications from small units of learning with support from NZQA and INZ

6

Work with employers to ensure work readiness and employability of graduates

# PRODUCTS AND PATHWAYS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	Develop VET programmes and services that align with New Zealand's unique attributes and market needs	Audit international market needs and match to learning outcomes, qualifications and visas	Government	Government	Government
		Offer multiple student intakes to match international demand	Government	Government	Government
		Use market knowledge, consortia and advantages to improve New Zealand's competitiveness	Government	Government	Government
2	Diversify products while increasing blended learning including offering dual badged qualifications	Formalise bilateral accreditation by NZQA and offshore authorities	Government		
		Embed technology into programme descriptors and delivery options to accelerate blended education	Sector		
3	Strengthen pathways across New Zealand's education system and into employment and residency	Make study and work visas generic across labour market subjects for priority immigration	Government	Government	Government
		Link the secondary sector and English language sector to ITP/ITO providers to maximise capture and pathways	Sector	Government	Government

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# PRODUCTS AND PATHWAYS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
4	<b>Increase the value of our graduates by adopting and embedding technology and applied science from industry</b>	Emphasise work readiness and applied New Zealand technology application giving work assurance	■		
		Target quality assured pathways for immigration or return to home country	■		
5	<b>Build and credentialise qualifications from small units of learning with support from NZQA and INZ</b>	Negotiate acceptance overseas for New Zealand equivalence of qualifications	■	■	■
		Lobby INZ to accept ITP-ITO supported work-based seamless pathways within visa process	■	■	■
6	<b>Work with employers to ensure work readiness and employability of graduates</b>	Position sector products between secondary and higher level study for differentiation	■		
		Integrate work placements and internships in all qualifications for international students	■		
		Capture employers/industry sector groups to maximise value of the education proposition	■		

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# RESOURCING OVERVIEW

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To achieve transformational economic growth, investment will target effective collaboration between ITPs/ITOs, government, NGOs and the private sector to increase scale, relevance and linkages between the NZ VET sector and employment.

Capable ITP providers, individually or with ITOs, in clusters and public/private partnerships, will have access to capital for investment in product, infrastructure and market development.

The medium and long-term commercial return will be sound and sustainable.

# STRATEGIC CHOICES — RESOURCING

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**1**

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

**2**

Align investment with capability, quality and reputation enhancement

**3**

Collaborate for offshore projects

**4**

Provide incentives for international revenue growth

# RESOURCING

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
<b>1</b> Enable better access to capital and R&D for international growth and risk sharing	Allow ITPs more flexibility to deploy their balance sheets and surpluses so they are more able to finance and assume the risks involved in international education growth initiatives	Government	Sector and Government	Sector and Government
	Allow ITPs more flexibility to deploy their balance sheets and surpluses so they are more able to finance and assume the risks involved in international education growth initiatives	Government	Government	Sector and Government
	Provide a pool of capital / co-investment fund to provide an alternative to develop international initiatives that do not rely solely on ITP balance sheets for risky but high value projects	Sector	Sector and Government	Sector and Government
	Develop governance to ensure support to collaborative export initiatives	Sector		
	Prioritise investment by Government in collaborations across regions and industries	Government		
	Jointly fund staff to develop and manage international projects outside of BAU activity	Government		
	Prioritise sector investment to both collaborative and commercial ventures of scale	Sector		
<b>2</b> Align investment with capability, quality and reputation enhancement				

KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# RESOURCING

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
<b>3</b>	<b>Collaborate for offshore projects</b>	Develop a single shared commercial entity for NZ VET providers including ITPs, ITOs and PTEs to jointly deliver projects offshore			
		Identify and broker opportunities for the NZ VET sector to collaborate in offshore delivery			
<b>4</b>	<b>Provide incentives for international revenue growth</b>	Develop effective and positive mechanisms to incentivise ITPs and their staff to grow international initiatives and revenues, especially offshore			

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

# CAPABILITY AND LEADERSHIP OVERVIEW

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To achieve sector cohesiveness and transformational export education growth, ITP leadership will clearly define, articulate, and buy in to a vision and strategy for change.

There will be investment in recruitment to engage, and professional development to increase, the level of commercial expertise including within partnering government agencies.

We will share knowledge and experience across the sector and with industry, including with ITOs, and receive higher quality market intelligence while developing the ability to respond more effectively to opportunities.

# STRATEGIC CHOICES – CAPABILITY AND LEADERSHIP

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**1**

Improve national leadership and governance for VET international education

**2**

Share knowledge, expertise and IP across the sector

**3**

Professionalise the sector

**4**

Ensure that the VET sector has an effective and cohesive peak body

# CAPABILITY AND LEADERSHIP

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
<b>1</b>	<b>Improve national leadership and governance for VET international education</b>	Ensure that sector strategies are aligned with the strategy of peak bodies to give complementarity			
		Ensure that governance skillsets include international education and commercial expertise			
		Include an international component in CEO professional development to ensure leadership			
<b>2</b>	<b>Share knowledge, expertise and IP across the sector</b>	Establish a networking and mentoring programme with leaders from other export sectors			
		Develop a single shared CRM/SMS and establish minimum service standards for all ITPs			
		Develop a shared centre of excellence for international education business development and project management expertise and best practice			

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# CAPABILITY AND LEADERSHIP

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
<b>3</b>	<b>Professionalise the sector</b>	Recruit experienced business development staff with international and commercial experience			
		International operations to occupy a position on senior management teams			
		Send key academic staff on international exchanges to grow their understanding and awareness of key markets and market opportunities			
<b>4</b>	<b>Ensure that the VET sector has an effective and cohesive peak body</b>	Develop an effective VET peak body for international education co-ordination and growth that covers ITPs / ITOs and PTEs			

## KEY RESPONSIBILITY

Sector
  Sector and Government
  Government

# PARTNERSHIP OVERVIEW

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To achieve transformational export education growth, we will deliver a greater level of cohesiveness.

We will work collaboratively across NZ VET providers, industry, ITOs, government and private sector partners, including international partnerships, to counter growing global competition from Asian economies in export education markets.

We will benefit from increased scale, capacity, capability and efficiencies by developing and using a range of best practice collaborative models locally, regionally, nationally and internationally.

Our approach to the international marketplace will be as a joined up “NZ VET Inc.” interdependent team, linked closely to offshore partners and collaborators, while retaining and building upon our regional and individual strengths.

# STRATEGIC CHOICES — PARTNERSHIP

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**1**

Develop a unified approach to offshore revenue generation with a strong customer focus

**2**

Enhance NZ VET coordination with ITPs and ITOs working together to achieve economies of scale and value

**3**

Develop integrated pathways for vocational students through to priority sectors of the New Zealand economy

**2**

Increase collaboration and integration within and between industry and government

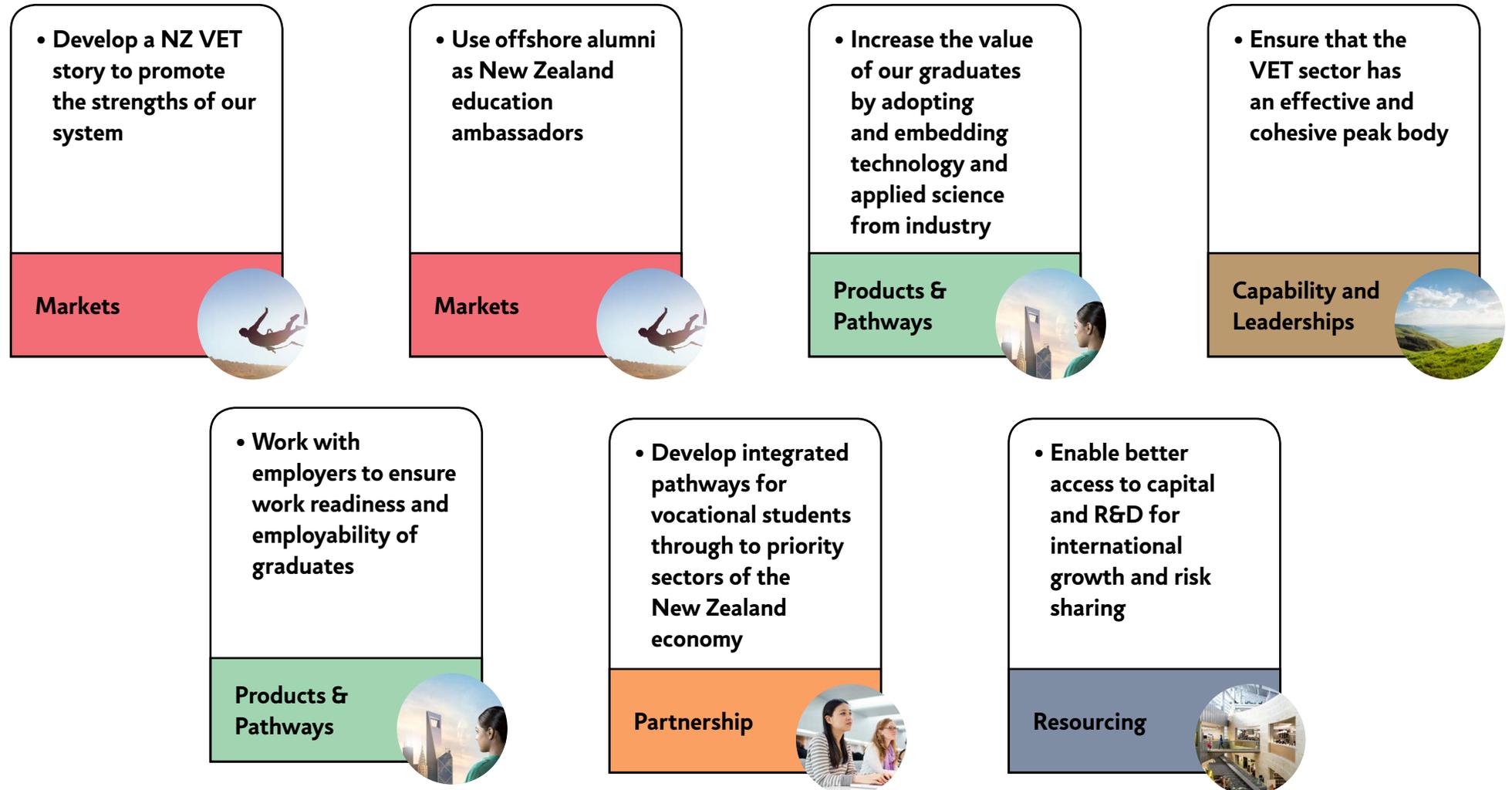
# PARTNERSHIP

		DURATION (YEARS)			
STRATEGIC CHOICES	SPECIFIC ACTIONS	0 - 3	3 - 5	5 - 10	
<b>1</b>	<b>Develop a unified approach to offshore revenue generation with a strong customer focus</b>	Develop a VET sector collaboration strategy between ITPs, ITOs, PTEs and Government to take advantage of offshore opportunities	Government	Government	Government
		Develop and share employment and career outcomes reporting to highlight employability outcomes for graduates	Government	Government	Government
<b>2</b>	<b>Enhance NZ VET coordination with ITPs and ITOs working together to achieve economies of scale and value</b>	Create a shared model for international education delivery offshore	Government		
		Target major companies in key markets to offer RPL for work experience and prior study	Government		
		Develop a shared model for international student recruitment onshore	Government		
<b>3</b>	<b>Develop integrated pathways for vocational students through to priority sectors of the New Zealand economy</b>	Develop VET "export entry" qualifications from New Zealand schools	Government	Government	Government
		Work with ITP advisory committees and employers to commit to employing international students	Government	Government	Government
		Establish flexible entry criteria at multiple entry points to NZ VET affiliated programmes	Government	Government	Government
<b>4</b>	<b>Increase collaboration and integration within and between industry and government</b>	Ensure government agencies and their staff have a common and agreed understanding of the importance of international education and the role and potential for VET within this	Government		

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

# PRIORITY CHOICES



# SUPPORTING YOUR JOURNEY TO SUCCESS IN 2025...

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A roadmaps analogy was used throughout this process because it was always going to be about the journey *as well* as the destination. While these documents are final drafts, it's far from over. ENZ will support industry to start the journey by:

1. Working with providers, peak bodies, sector groups, regional bodies and other key stakeholders to widely communicate the sector and industry roadmaps and their key features.
2. Working with each sector to develop a joint work plan that will identify what the highest priority roadmap projects are and who (industry, ENZ, or jointly) will take responsibility for leading them.
3. Working with each sector to develop the detail of how each priority sector-focused project will be approached, what costs and benefits can be delivered, and when it can be delivered.
4. Facilitating the establishment of a cross-sector project steering group to lead a collaborative approach to high priority roadmap projects where they require a multi-sector or pan-industry approach, including the identification of best practice across sectors.
5. Working alongside each sector and the cross-sector project steering group to appropriately support the implementation of the agreed high priority roadmap projects for 2014/15.

# YOU'RE IN THE DRIVING SEAT NOW

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To create the kind of future mapped out in the roadmap we seek your commitment to starting the journey and leading the way by:

1. Working with your colleagues, stakeholders, other providers, and peak body or sector groups to widely communicate the sector and industry roadmaps and their key features.
2. Working with other providers in your sector to develop a joint work plan that will identify what the highest priority roadmap projects are and who (industry, ENZ, or jointly) will take responsibility for leading them.
3. Working with your sector to develop the detail of how each priority project will be approached, what costs and benefits can be delivered, and when it can be delivered.
4. Working alongside other providers in your sector to support the implementation of agreed high priority roadmap projects for 2014/15.
5. Adopting the changes in your School, institution or company that are part of making the journey to 2025.

**“Change will not come if we wait for some other person or some other time. We are the ones we’ve been waiting for. We are the change that we seek.”** Barack Obama

# ACKNOWLEDGEMENTS

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Education New Zealand would like to thank all those who contributed to the development of this strategic roadmap for the ITP sector, including workshop attendees and the following institutions and individuals:

Programme Manager: Alasdair MacLeod, Growth Solutionz

Project Manager: John Snook, Action Consulting Group Limited

Advisory Committee: Peter Brothers, Chief Executive, Manukau Institute of Technology

Garry Fissenden, Chief Executive, The Skills Organisation

Margaret Noble, Chief Executive, Waiariki Institute of Technology

Kay Giles, Chief Executive, Christchurch Polytechnic Institute of Technology

Don Campbell, Chief Executive, Whitireia New Zealand

Kevin Bryant, Chief Executive, Primary ITO

Interview Participants: Unitec, Manukau Institute of Technology, Waikato Institute of Technology, International Education Consultants UK, Southern Institute of Technology, Nelson Marlborough Institute of Technology, Waiariki Institute of Technology, Taratahi Agricultural Training Centre, Christchurch Polytechnic Institute of Technology, Whitireia New Zealand, Industry Training Federation, The Skills Organisation

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