
STATEMENT OF INTENT

2019-2023



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Foreword

A sector in transition

Education New Zealand (ENZ) is an organisation in change. International education is evolving; so is the world we work in. There is a growing realisation that the international education sector has untapped potential to offer much more for New Zealand and for international students.

This is the first Statement of Intent that ENZ has prepared since the adoption of the International Education Strategy 2018-2030. It is the first to reflect the thinking of a new Board Chair and a largely new Board.

The International Education Strategy sets out a new course for international education. It is a future in which international education is at the forefront of a changing education environment. It will be tightly aligned not only with domestic education, but also a key

link to New Zealand's economic development and our place in the world.

Since its formation in 2011, ENZ has made significant progress in taking New Zealand's education proposition to the world. It has created – and is currently refreshing – a highly impactful and visible international brand. It has worked with providers and others throughout New Zealand to help build the capability of organisations that offer international services. It has overseen several years of strong growth in the numbers of international students choosing New Zealand as a study destination.

But more of the same will not assure future success. International education is about much more than the sale of education services to international students who choose to come to



ENZ's Board members (left to right): Dr Linda Sissons, Lyn Provost (sitting), Karen Rolleston, Rachael Tuwhangai, Chair Steve Maharey (sitting) and Victoria Spackman.

New Zealand. Every year, there are more choices available to learners. It's possible to get an international education without leaving your home.

Increasingly students, whatever their age, expect the pick-and-mix flexibility of micro-credentials that can be adapted to different needs and different stages of life. Getting on a plane to fly around the world for a multi-year course of study is no longer the default option for many.

New Zealand won't succeed if it makes its pitch at a market that is disappearing.

In 2019-2020, ENZ is working on options to embrace a broader, more sustainable future for international education, in line with the transformation envisaged by the International Education Strategy.

True global citizenship can contribute a rich component to New Zealand's domestic education, emphasising diversity, inclusion and international awareness.

International education enhances New Zealand's standing in the world, emphasising diversity, inclusion and global connectedness.

Successful international education can help ensure the success of domestic education

initiatives such as the reform of vocational education, and other parts of the sector. Wherever they are, successful education providers will increasingly have an international component.

At its core, international education for New Zealand is all about changing for the better. It changes students and their families, whether the student is coming to New Zealand or a New Zealander is getting part of their education overseas.

International education changes the lives of those overseas who cannot get to New Zealand, with access to New Zealand programmes, products and services delivered to them. It provides a pool of talent which can be utilised in New Zealand around scarce skills or by New Zealand companies looking to expand into foreign markets. It provides life-long connections which enrich lives and supports New Zealand's diplomatic engagement.

In a fraught, complex world, New Zealand has much to offer.

ENZ is working to deliver that potential.



Steve Maharey

Board Chair

13 June 2019



Lyn Provost

Board member

13 June 2019

About Education New Zealand

Our purpose is to take New Zealand’s education experiences to the world for enduring economic, social and cultural benefits.

Who we are

ENZ is charged by the Government to work on many fronts to secure a vibrant, healthy international education sector in New Zealand – bringing benefits to New Zealanders, educational institutions and international students.

ENZ is a Crown Agency and the only New Zealand government agency solely focused on international education. Our role is to provide a range of marketing, promotion and representation functions to give effect to the Government’s goals for international education. The Ministry of Education and the Ministry of Business, Innovation and Employment are our monitoring agencies.

In New Zealand, we have staff in Auckland, Wellington and Christchurch. Overseas we have staff in Brazil, Chile, China, Germany,

India, Indonesia, Japan, Malaysia, Republic of Korea, Saudi Arabia, Singapore, Taiwan, Thailand, the United States of America and Viet Nam. ENZ’s overseas staff are co-located with the Ministry of Foreign Affairs and Trade or with New Zealand Trade and Enterprise.

Our statutory functions are shown in Appendix One.

Who we work with

The international education sector is our customer. We work with New Zealand’s diverse international education providers, including tertiary education organisations (TEOs), English language schools and schools. We also work with education agents, and organisations that export education services, such as publishers, consultancy services and education technology businesses.



We engage with international students¹ at all stages of their student journey – from when they are just beginning to dream about a New Zealand study experience through to being alumni with successful careers all around the world.

Through the Prime Minister’s Scholarships, we work with New Zealand students by supporting overseas study opportunities that help develop their international skills.

The next four years

Through the International Education Strategy 2018-2030², the Government has laid out ambitious aspirations for international education in New Zealand’s future. ENZ has a lead role in ensuring that the international education sector thrives both now and in the future. We will be thought leaders and strategic partners for other agencies and international education providers. We will do this by:

- leading international education thinking
- promoting an excellent student education and experience
- growing sustainable international education

- developing global citizens.

Our Board

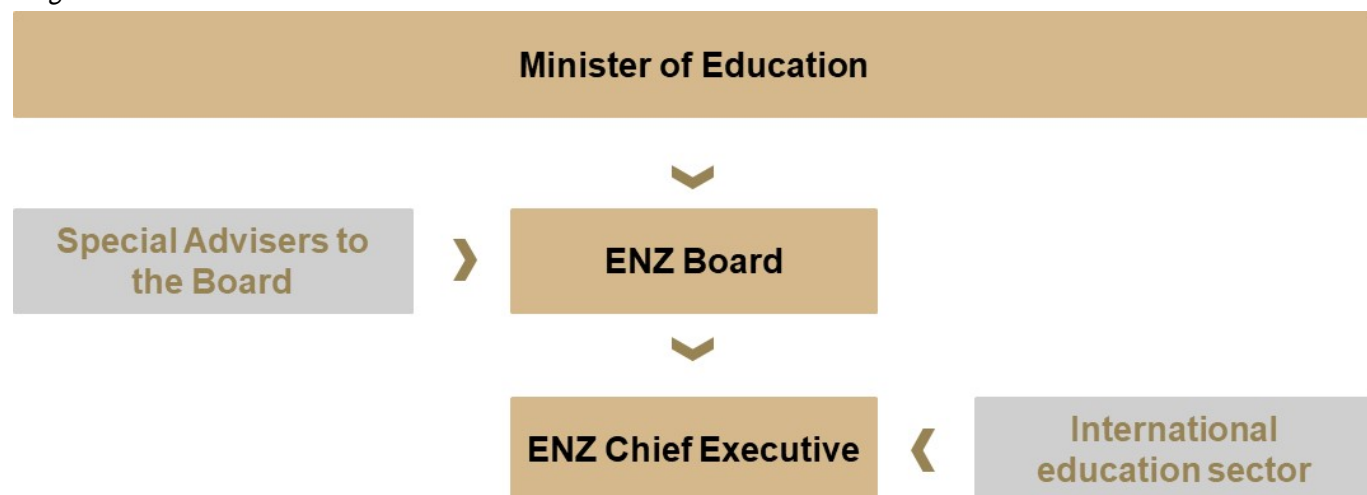
ENZ’s Board is made up of members appointed by the Minister of Education. The Board is responsible for ENZ’s governance, including setting its strategic direction and monitoring performance. The Board meets regularly to carry out governance functions and address major challenges that may impact international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

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

Special advisers to the Board help guide and shape the Board’s work and ensure connections with the strategic direction of other New Zealand government agencies. The special advisers represent:

- the Ministry of Education
- the Ministry of Business, Innovation and Employment
- the Ministry of Foreign Affairs and Trade
- the New Zealand Qualifications Authority.

Diagram 1: Governance of ENZ



¹ International students are non-residents of New Zealand and have expressly entered New Zealand with the intention of study or have enrolled with a New Zealand provider overseas. ENZ counts international PhD students, exchange students, NZ Aid students, foreign research postgraduate students and full fee-paying international students as international students.

² This Statement of Intent includes calendar year and financial year information. A calendar year is shown as a single year, such as 2019, while dates such as 2019/20 refer to a financial year.

Government priorities

The Government's main priorities

We support the Government's goals for building a productive, sustainable and inclusive economy and improving the wellbeing of New Zealanders and their families. International education plays a key role in building the human and social capital that will lead to improved wellbeing and higher living standards for New Zealanders.

In promoting inclusion, diversity and New Zealand approaches to global issues, international education can play a growing role in helping define New Zealand's place in the world.

International education is one of New Zealand's most valuable exports. Our focus on the sustainable growth of the sector supports the Government's goal of sustainable economic development.

We support the responsible management of the Government's finances by ensuring we deliver our work programme efficiently and effectively, and by delivering value for money.

New Zealand's education system

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

Many parts of the New Zealand education sector are undergoing change and reform. ENZ will continue to engage with the other education agencies on the Education Work Programme, contributing our specialist insight and expertise in international education. A rich and growing international focus has much to offer the education system.

Tertiary Education Strategy

The Tertiary Education Strategy 2014-2019 outlines the strategic priorities that support the

shared outcomes for the New Zealand education system. We work with New Zealand's other education agencies and with TEO's to realise the strategic priority of 'Growing international linkages' and support the priority of 'Strengthening research-based institutions'. We do this by providing support to TEO's to build their international capability and by assisting them to promote student mobility.

We will contribute to the review of the Tertiary Education Strategy to ensure that tertiary education continues to benefit from the stronger global connections, research links and partnerships that international education brings.

New Zealand's international education sector

International Education Strategy

The International Education Strategy 2018-2030 aims to create 'A thriving and globally connected New Zealand through world-class international education'. It is underpinned by the determination that New Zealand has much to offer the world – and that international education has much to offer New Zealand.

The strategy is guided by three goals:

- Delivering an excellent education and student experience
- Achieving sustainable growth
- Developing global citizens.

The strategy builds on New Zealand's quality education system. It focuses on delivering good education outcomes for international students and global opportunities for domestic students and New Zealand's education providers.

Our strategic themes are aligned with the International Education Strategy's goals and show the contribution we intend to make towards achieving each of those goals.

Our operating environment

International education in New Zealand

In 2018, international education contributed \$5.1 billion to the New Zealand economy, while delivering social, cultural and educational benefits to New Zealand. International education is currently New Zealand’s fifth largest export industry, behind logs, wood and wood articles (\$5.4 billion).³

Student mobility

International students enrolled with New Zealand providers

In 2017, 125,392⁴ international students were enrolled with New Zealand providers, a 5% decrease compared to 2016. This was driven by a 26% decrease at unfunded⁵ private training establishments and 17% decrease at funded private training establishments.⁶

China is New Zealand’s largest source of international students. However, demand

growth in the China market is forecast to slow, and eventually decline, due to an aging population, increased competition and increased domestic education capacity.

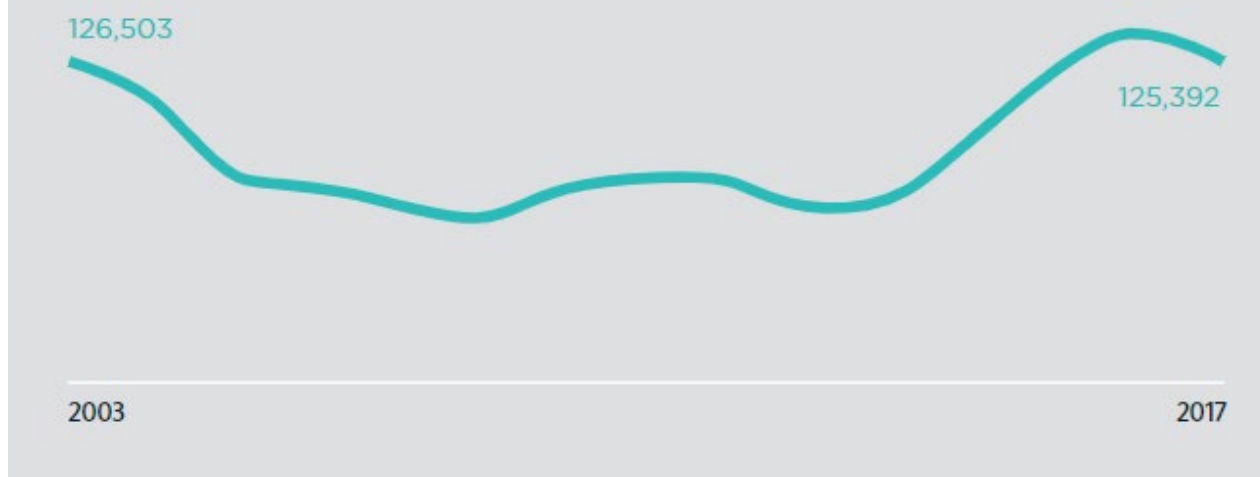
Auckland continues to attract over 60% of international students in New Zealand, reflecting its concentration of education providers and the presence of existing ethnic networks.

New Zealanders studying overseas

In 2017, 6.4% of New Zealand university students undertook a period of study overseas⁷. The International Education Strategy envisages a future when more New Zealand students have an international component to their education.

We administer the Prime Minister’s Scholarships for Asia and the Prime Minister’s Scholarships for Latin America, which enable New Zealanders to undertake a period of study in those regions.

Number of international students enrolled with New Zealand providers, 2003 - 2017



³Statistics New Zealand: Goods and Services Trade by Country: Year ended March 2019.

⁴ *Export Education Levy and Tertiary Single Data Return*, Ministry of Education.

⁵ 'Funded' or 'unfunded' refers to whether the private training establishment receives government funding.

⁶ Detailed intelligence and insight on international education in New Zealand can be found on ENZ's intelligence portal, <https://intellilab.enz.govt.nz/>

⁷ *New Zealand International Education Benchmark*, 2018.

The wider New Zealand environment

New Zealand's policy environment for international education is complex. It affects not only student mobility flows, but also the attractiveness of the sector to new education providers and businesses.

Education and immigration policy settings, and the recognition of New Zealand qualifications internationally, affect New Zealand's attractiveness to potential international students. At the same time, policy settings need to deliver the best overall outcomes for New Zealand. We will use our experience and market insight to inform policy settings and practices that affect international education.

We will work closely with other government agencies to influence policies that affect students' and education providers' decision making, and to reduce barriers to the sustainable development of international education.

Telling the international education story in New Zealand

Many New Zealanders are unaware of the benefits of international education for New Zealand students and communities. International education supports cultural exchange, helps to grow lifelong friendships and strengthens international connections between countries. We will continue to build New Zealanders' awareness of the benefits of international education across New Zealand.

The international environment

In the world of education, global forces such as the changing world of work, blurred industry boundaries, evolving digital behaviour, increasing international competition and the rise of continuous learning have the potential to have a profound impact.

Changing nature of work

The world of work is changing rapidly. The pace of change means that the skills and attributes needed in the workplace are changing. As a result, 'typical' students are not only people aged 15-25 years old. Changes in the world of work mean that learners of all ages need access to ongoing education throughout their careers.

Supply of international education

The capacity to deliver education to international students is growing rapidly in both English speaking and non-English speaking countries. Many of these countries are seeking to grow and diversify their international student base. Increased competition significantly increases the number of quality options available to global learners.

New Zealand will need to ensure that it offers an excellent education and student experience, and that it provides a distinctive point-of-difference to the other education choices available globally.

Changing the way education services are delivered

Education is a rapidly changing field with increasingly flexible programmes and modes of delivery. This creates opportunities and risks for New Zealand's international education sector as learners demand greater flexibility and education choice.

International education in New Zealand primarily involves fee-paying international students attending 'bricks and mortar' institutions in New Zealand and we expect this to continue over the next four years. However, in the longer term, sustainable growth will depend on how well education providers adapt to changes in demand and how well they can deliver education services to international students through various forms of transnational education.

Our outcomes framework

Our outcome 'New Zealand international education activities provide enhanced social, cultural and economic benefits' contributes to the Government's goals of building a productive, sustainable and inclusive economy and improving the wellbeing of New Zealanders and their families. Together with other government agencies and the international education sector, we are working to ensure a thriving and globally connected New Zealand through world-class international education.

The diagram on the next page sets out our medium-term strategy. It provides an overview of what we will do towards achieving our outcome and how we will measure the impact of what we do.

To ensure New Zealand benefits from international education now and in the future, we will lead international education thinking by:

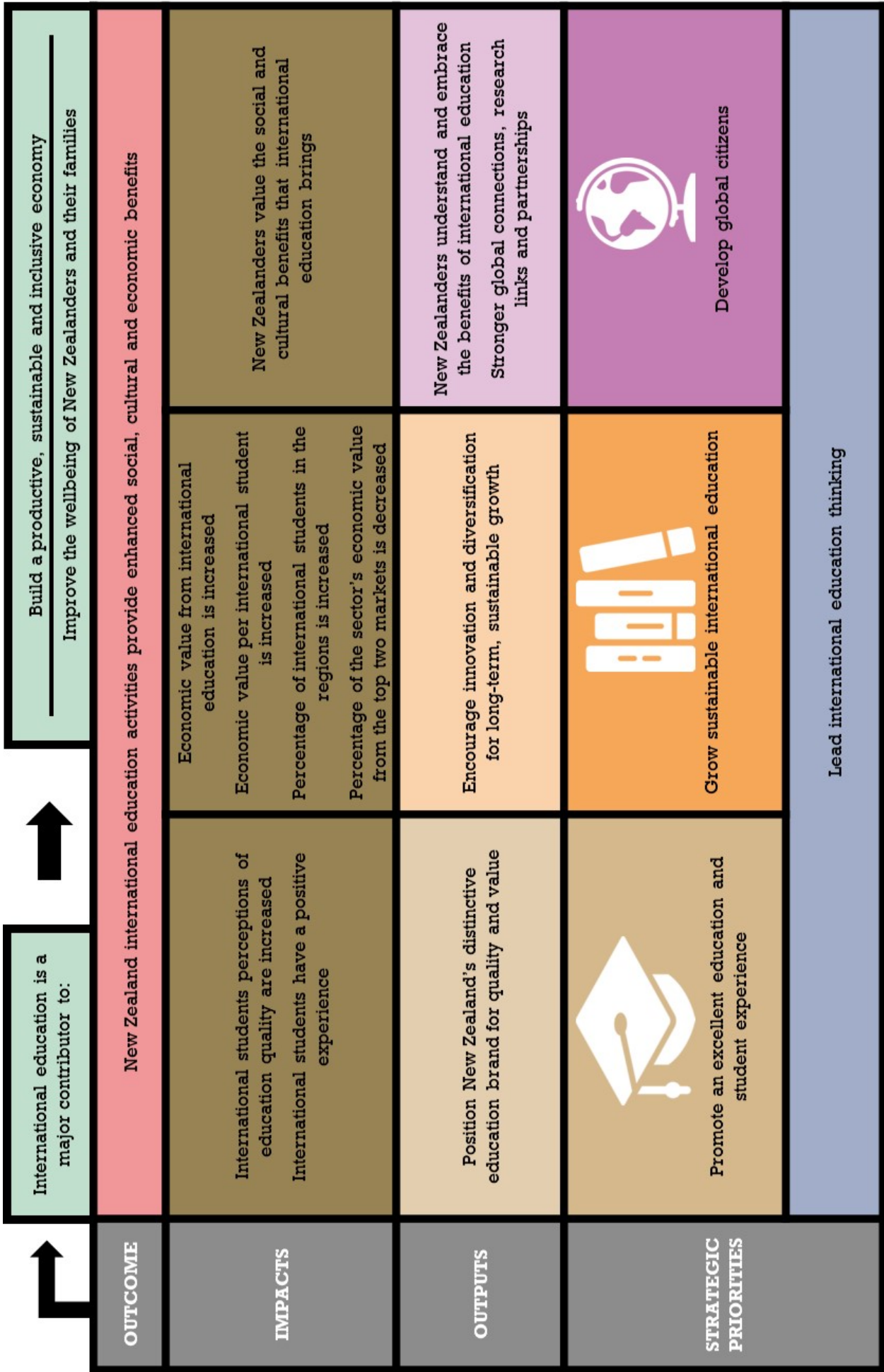
- taking a future focus to identify the opportunities and competencies required for international education to thrive in the long-term
- taking a strategic focus to influence and drive policy alignment across regulatory agencies
- providing intelligence and insight that enables education providers, government agencies, stakeholders and ENZ to make better informed decisions.

ENZ will promote an excellent education and student experience by positioning New Zealand's education brand for quality and value. It will grow awareness of New Zealand and attract high-quality students. We will capture the hearts and minds of international students and their families by delivering consistent story-telling around New Zealand's distinctive education experience and focus on student wellbeing.

Encouraging innovation and diversification will ensure the long-term, sustainable growth of international education. We will continue our work to diversify New Zealand's student attraction markets. We will also continue to focus on diversifying where international students study in New Zealand to enable a more even distribution of the benefits of international education.

Encouraging New Zealanders to spend time studying overseas will contribute to the development of global citizens. We will support activities that enable New Zealanders to share their ideas, culture and knowledge with the world, building international connections and capabilities.

We will also work to continuously improve our expertise and ability to work with students, education providers, government agencies and stakeholders to increase the benefits of international education to New Zealand, and ensure we have the right platforms and tools to do so.



Our operating intentions

Our outcome: New Zealand international education activities provide enhanced social, cultural and economic benefits

To achieve our outcome, we have identified four strategic priorities to shape our work as the 'go to' agency for international education.

Lead international education thinking

In 2019/20 ENZ will develop a success indicator to measure the impact of our work to lead international education thinking.

Inform and influence government agencies in support of international education

The success of the international education sector will require many organisations to work well together to deliver the goals of the International Education Strategy. This includes government agencies, providers and communities and local government.

ENZ will take a strategic focus to influence policy alignment across regulatory agencies to create an environment in which international students receive a consistently high-quality education and enjoy a positive student experience in New Zealand. We will work to ensure that the social, cultural and economic benefits of international education are embraced and shared across New Zealand.

We will share our intelligence and insights with government agencies as they develop and review policies and programmes that could affect the international education sector. This will include intelligence from our offshore staff to provide an international in-market perspective.

Implementing the proposed changes to New Zealand's education system⁸ will create opportunities to promote New Zealand's high-quality education system to potential international students and their families. ENZ will work with other government agencies and with education providers to support the implementation of any changes.

We will operate as NZ Inc overseas, working interactively with other New Zealand agencies, such as the Ministry of Foreign Affairs and Trade, and will support their activities to promote New Zealand.

We will work with the Ministry of Education and the Ministry of Foreign Affairs and Trade in the area of international diplomacy, and leadership of NZ Inc efforts overseas to advance educational opportunities, the promotion of education internationally and the use of diplomatic activities such as Free Trade Agreement negotiations.

In 2019/20, we will scope and explore a 'fit for purpose' offshore network and approach, moving us from a solely geographical model. This will support the building of deeper reciprocal government, academic and institutional partnerships to strengthen the perception of New Zealand's high-quality education system.

Lead information and intelligence provision

Via IntelliLab, our online intelligence portal, we will continue to provide information and intelligence to meet the needs of government agencies and New Zealand international

⁸ These include the proposed changes to vocational education system, the NCEA qualification and Tomorrow's schools which have been publicly consulted on, but the final decisions by government have yet to be announced.

education providers, businesses and peak bodies. We will continue to refine existing intelligence and insight products and develop new products so that we lead:

- information and intelligence provision on international education's markets, student experiences and products
- information and intelligence provision on the current state of international education, both in New Zealand and globally
- the future thinking of the international education sector.



Promote an excellent education and student experience

We will capture the hearts and minds of international students by delivering consistent story-telling around New Zealand's international student education experience. This story-telling will reinforce that New Zealand is an open, welcoming country that provides students with a rich and rewarding experience that prepares them for the future.

Promote New Zealand's distinctive education brand

In 2019/20 we will roll out a refreshed 'Think New' brand strategy across all of our activity to position New Zealand's high-quality education. Working in partnership with the sector and other industries, we will work to identify and grow specialist education offerings that contribute to a distinctive New Zealand proposition.

We will communicate the high-quality of New Zealand education to high-value potential students and their families with the goal of raising perceptions of the quality of a New Zealand education. Through our promotional activities, we will target high-value segments of the potential international student population.

In 2019/20, we will rollout year three of our database marketing programme to ensure we deliver a personalised digital experience for prospective students. This includes the MyStudyNZ matching service and ongoing communications, tailored to students' preferences and study interests.

Our database marketing programme will also be used to give us insight into which channels are delivering the strongest engagement and conversion to study in New Zealand. The data insights will be used to inform our channel strategy, continuing our shift from promotions-based activity to strategic, data-driven marketing.

In 2018/19, ENZ launched a Digital Media Centre⁹ to provide international and domestic media with access a rich range of material about international education, including stories, messages, statistics, photos, videos and graphics. ENZ will continue to invest resources in the development of the centre – which will also be a channel for New Zealand providers to take their international initiatives to wider audiences.

Education agents will be integrated into our marketing activity. Our agent training platform will provide a portal for ENZ to provide information to agents while ensuring agents deliver our brand story, the unique benefits of a New Zealand education, key messages about our regional strengths, and set clear and realistic expectations for an excellent student experience. The ENZ Recognised Agency programme will support high-quality, top performing agents who work effectively with students coming to New Zealand.

All marketing activity will be integrated with our overall student journey strategy. We will ensure our brand promise is supported through our student experience initiatives. We will work with current and former international students to foster their advocacy for a New Zealand education and recruit them to provide authentic story-telling to others about their New Zealand education experience.

We will encourage education providers to use our brand activities, marketing campaigns and the New Zealand Story as support for their own promotional activity. We provide marketing support to the sector by providing the 'Think New' brand and ENZ's Brand Lab marketing toolkit for use in promotional activities. The toolkit is targeted at New Zealand providers seeking to attract international students to New Zealand or deliver education services overseas.

⁹ The Digital Media Centre will also support the strategic priority of "Develop global citizens" as the Centre provides stories to New Zealand media to help tell New Zealanders about the benefits of international education.

Support student experience and wellbeing

We will deliver integrated promotional activities across a range of channels.¹⁰ The activities will focus on targeted student attraction, combining our global brand messages with country or sector-specific content.

Placing students at the centre of our approach is vital if we are to stay abreast of current and future needs and trends, and ensure New Zealand continues to present an attractive, compelling proposition to internationally mobile learners.

The Ministry of Education develops the pastoral care standards for international students. The New Zealand Qualifications Authority administers the Education (Pastoral Care of International Students) Code of Practice and monitors the performance of education providers who are signatories to the

Code. We take a thought leadership role around research, insights and best practice on the delivery of excellent student experience and wellbeing for international students across New Zealand. ENZ's priority areas have been identified as mental wellbeing, employability and social inclusion and improving information access.

We will continue to work with education providers, student groups, government agencies, local government and community groups to ensure the overall student experience – from recruitment through to advocacy activities after graduation – builds on New Zealand's positive and distinctive brand of education.

NauMai NZ¹¹, our student experience digital platform, will provide consistent, relevant and accessible information for international students, via a single trusted source. It will serve as a 'one-stop shop' for content from government agencies, tailored for an



¹⁰ The channels include social media, search engine marketing, public relations, in-market events and media and education familiarisation visits to New Zealand.

¹¹ <https://naumainz.studyinnewzealand.govt.nz/about-naumai-nz>

international student audience. In 2019/20 the platform will be expanded to cover international students while they are studying and deliver more personalised content, targeted at meeting students' needs. NauMai NZ will then be further enhanced to deliver an end-to-end, seamless and integrated experience that enables social connections and provides a personalised peer-to-peer experience.

NauMai NZ also provides information on New Zealand's culture and lifestyle, including Tikanga Māori to help international students understand and respect Māori customs and

how to interact in Māori culture. We will encourage international students to sign up to NauMai NZ so they can be sent trusted information, help and advice to have an excellent experience while living and studying in New Zealand.

ENZ will ensure that the international student experience and student voice continue to be brought into key decision-making to ensure consistent standards of high-quality education, pastoral care and living experience.

We will collect feedback from international students to ensure that their expectations are met.

Impact: International students' perceptions of New Zealand's education quality are increased.

Indicator of success: International student perceptions of education quality.

Actual 2018	Target 2019	Target 2020 ¹²	Target 2021	Target 2022
8.0 out of 10 ¹³	Increase	8.2 out of 10	Increase	Increase

Impact: International students have a positive experience.

Indicator of success: The percentage of international students who were satisfied or very satisfied with their overall experience.

Target 2018/19	Target 2019	Target 2020	Target 2021	Target 2022	Target 2025 ¹²
≥ 85%	Establish new baseline ¹⁴	Increase	Increase	Increase	92-95%

¹² This target is also reported in the International Education Strategy 2018-2030.

¹³ Kantar TNS: *Brand Health Monitor*.

¹⁴ A new student experience survey will be run in 2019 to establish a new baseline.

Grow sustainable international education

Sustainable growth in international education is dependent on New Zealand delivering quality education and student wellbeing, connecting with a diversity of markets, producing innovative products and services, and taking account of immigration and labour market considerations.

Drive diversification

Diversification of markets and products remains a priority. ENZ will continue to develop an evidence-based approach to investment in global promotional activities, whereby the mix of investment between globally focused digital marketing campaigns and in-country market activities is informed by the effectiveness of promotional channels in each market.

ENZ's investment in marketing and promotion will continue to be underpinned by our annual activity planning process. We will regularly review and prioritise markets to ensure we continue to maximise the benefit for New Zealand, and ensure we have the agility to take advantage of emerging opportunities.

New Zealand's regions are well placed to offer rich and diverse experiences and opportunities to international students and we will actively promote their distinctive education offerings. We want to ensure that all of New Zealand accrues the widest possible benefits from international education.

We will work with regional economic development agencies, peak bodies and education providers to sustainably grow the value of the sector to New Zealand's regions. This will include working with education providers to align their international student recruitment activities more closely with national and regional skills needs.

Support sector development

We will undertake activities to continue to build the international education sector's capability. The activities will evolve to reflect ENZ's value proposition and feedback from the sector.

We will develop a more in-depth understanding of the capacity and capability for international education in New Zealand so that we can identify both the opportunities for, and the barriers to, sustainable growth. We will encourage providers to collaborate with partners so they can benefit from opportunities that exceed the capacity or capability of a single provider. Based on our improved understanding of the sector's capacity, we will work to improve the alignment between the supply of and demand for international education.

We will work with the education sector and with other government agencies, such as New Zealand Trade and Enterprise and the Government-to-Government office, to identify and develop opportunities for education delivery overseas. Most of the overseas activities undertaken by education providers are project based and not necessarily linked to a specific location. We envisage our support will vary from project to project, and may include:

- providing market intelligence
- providing advice on the steps involved in exploring a potential opportunity
- supporting a delegation visit to explore opportunities in a market
- helping a New Zealand provider to undertake due diligence of a proposed deal
- providing support to investigate a potential new market.

We will work with other New Zealand government agencies to promote government to government relationships that support international collaboration and partnerships.

Impact: The economic value from international education is increased.

Indicator of success: The economic value¹⁵ from New Zealand's international education sector.

Actual 2018	Target 2019	Target 2020	Target 2021	Target 2022	Target 2025 ¹⁶
\$5.1 billion ¹⁷	\$5.1 billion	Maintain ¹⁸	Increase	Increase	\$6 billion

Impact: The economic value per international student is increased.

Indicators of success: The economic value per international student.¹⁹

Actual 2018	Target 2019	Target 2020	Target 2021	Target 2022
\$39,290	Increase	Increase	Increase	Increase

Impact: The percentage of international students in the regions²⁰ is increased.

Indicators of success: The percentage of international students enrolled to study outside Auckland.²¹

Actual 2017	Target 2019	Target 2020	Target 2021	Target 2022
39%	Increase	Increase	Increase	Increase

Impact: The percentage of the sector's economic value from the top two markets is decreased.

Indicators of success: The percentage of the international education sector's economic value coming from New Zealand's top two markets.²²

Actual 2018	Target 2019	Target 2020	Target 2021	Target 2022	Target 2025 ¹⁶
49%	Decrease	Decrease	Decrease	Decrease	40%

¹⁵ ENZ commissions a full economic value analysis of the international education sector every two years. In alternate years, ENZ reports an estimated sector value based on the most recent economic value analysis and current year student enrolment figures.

¹⁶ This target is also reported in the International Education Strategy 2018-2030.

¹⁷ m.e. consulting: *Economic valuation of international education in New Zealand 2018* and PWC: *The value of New Zealand's education exports 2018*.

¹⁸ The achievement of this target is subject to some risks which are included in the risk section on page 22.

¹⁹ Calculated by dividing the total economic value (from the full economic value analysis) by the number of international student enrolments.

²⁰ All of New Zealand, excluding Auckland.

²¹ The International Education Strategy has a target of "an increasing proportion of value coming from the regions by 2030".

²² It is intended that the total economic value of the other markets increases.

Develop global citizens

The International Education Strategy deliberately opens up new horizons for international education – far beyond selling educational services. Global citizens are those who can study, work and live across cultural and national boundaries. International education brings people together from around the world to share ideas, skills and knowledge, and in doing so creates enduring friendships. Global skills and knowledge can be taught by New Zealand education providers, gained through international students participating in education and society in New Zealand and through students being able to spend time studying overseas.

Having a welcoming environment encourages international students to participate in New Zealand education and society, and gain the skills they need to study, work and live across cultural and national boundaries.

Telling the story

A thriving and sustainable international education sector needs the support and buy-in of New Zealanders. This will help New Zealand maintain a reputation for being a welcoming place for international students.

We will broaden understanding of the value of international education by New Zealanders and other government agencies, particularly the social, cultural and economic benefits. To do this we will continue to tell the international education story and improve our understanding of New Zealanders' perceptions of international education.

Our Digital Media Centre will showcase the breadth and quality of international education

in New Zealand. This will help both telling the story within New Zealand, and in supporting ENZ's in-country and other digital activities to promote New Zealand's education internationally.

Administer scholarship programmes

ENZ will seek to use scholarships to strategically engage with New Zealand education providers, students, alumni and communities. We will work with the Ministry of Education and Ministry of Foreign Affairs and Trade so that New Zealand's scholarships strategically deliver equity, inclusiveness and international engagement.

We will help New Zealand students build life-long friendships and networks in Asia and Latin America by administering the Prime Minister's Scholarships for Asia and the Prime Minister's Scholarships for Latin America. These scholarships enable New Zealanders to enhance their skills through study overseas across a wide range of courses and locations.

The presence of skilled New Zealanders studying internationally also helps to establish and maintain links between academic institutions, promote the high-quality of the New Zealand education system and encourages student mobility.

International education is building a global network of New Zealand-educated graduates who are powerful advocates for New Zealand and its values. In the medium to long-term, ENZ will work with other agencies to develop a sophisticated alumni strategy, who can make a big contribution to the way New Zealand interacts with the world.

Impact: New Zealanders value the social and cultural benefits that international education brings.

Indicators of success: Awareness of the contribution of international education to New Zealand.²³

Actual 2017/18	Target 2019/20	Target 2020/21	Target 2021/22	Target 2022/23
63% ²⁴	Increase	Increase	Increase	Increase

²³ ENZ commissions research (including both qualitative and quantitative approaches) to identify New Zealanders' perceptions of international education. The target is focused on an increasing trend over a four-year period.

²⁴ Kantar TNS: *Understanding New Zealanders perceptions of international education 2018*.

Our organisational development

We prioritise our activities to ensure that we deliver the best return on the Government's funding for ENZ. Our capabilities, systems and processes position us well to make a significant contribution towards the goals of the International Education Strategy 2018-2030. However, there are risks that could impact on the achievement of these goals, some of which are identified in the risk section of this Statement of Intent.

Our Ngā Mātāpono (principles) are Manaakitanga, Kaitiakitanga, Whakawhanaungatanga and Aroha. Along with our Ways of Working, they create the foundation for ENZ and support the 'Think New' brand we use to promote international education. Our Ways of Working are:

- Think Bold
- Think Open
- Think Team

We will ensure our organisational development activities are well aligned with our long-term strategy and support the efficient and effective delivery of our activities.

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.

Te Rautaki Māori

In 2019 we will finalise and start implementing Te Rautaki Māori. This strategy has three Ngā Whaingā (key objectives):

1. Develop and foster the use of te reo me ōna tikanga by all staff
2. Work towards identifying a Māori name for ENZ that encompasses our role, vision, Ngā Mātāpono and Ways of Working
3. Weave te reo me ōna tikanga Māori into ENZ's purpose, which is to take New Zealand's education experiences to the

world for enduring economic, social and cultural benefits

Our people

After consultation with staff, ENZ is rolling out some changes to its organisational structure, primarily designed to align ENZ more closely with the goals of the International Education Strategy. The main changes have been made and flow-on appointments will be filled in 2019/20.

We will continue to have a global team with the flexibility and agility to ensure ENZ is fit for purpose. Our scoping and exploring a 'fit for purpose' international operating model in 2019/20 will assist us to ensure that we have people with the appropriate capabilities in the right locations to achieve ENZ's strategic priorities.

Our organisational performance measures will continue to be reflected in individual performance agreements.

Our People Strategy will focus on:

- Planning and resourcing
- Employee engagement and performance improvement
- Developing our people
- Recognising and rewarding our people
- Building the safety and wellbeing of our people

Good employer matters

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

Our status as a good employer will be assessed against the elements and criteria set out by the

Human Rights Commission. Over the next four years we will continue to ensure that all elements are in place and working well through our People Strategy.

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

Success indicator	Target 2018/19	Target 2019-2023
Employee engagement	Establish new baseline	Increase

Our technology

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

During 2019/20 we will continue to focus on improving our student and sector facing digital platforms across a range of services including student experience and wellbeing and capturing students' journeys to graduation and into post-study.

Our expertise

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

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

Our systems and processes

Capital and asset management intentions

ENZ incurs minor capital expenditure for the lifecycle replacement of furniture, office equipment and computer hardware. We have one motor vehicle that we own in Beijing, China and is fully depreciated and one that we lease in Singapore. ENZ is currently refreshing its brand digital assets which will be launched to the sector in 2019/20.

The table below summarises the forecast value of our capital assets at 30 June 2019 and our forecasted capital expenditure to 2022/23.

\$000	Forecast net book value at 30 June 2019	Comment	Forecast 2019/20	Forecast 2020/21	Forecast 2021/22	Forecast 2022/23
Furniture and office equipment	13	Lifecycle replacement only	20	20	20	20
Computer hardware	152	Lifecycle replacement of hardware only and a continued move to the cloud and 'as a service' model	100	100	100	100
Motor vehicles	-	No replacement plans	-	-	-	-
Leasehold improvements and make-good	43	Lambton Quay office fit-out completed in 2015	20	20	20	20
Intangible assets	81	Brand digital assets; refreshed visual identity, videos, photography, other creative assets and documentation	550	-	-	-

Risk management strategy

There are risks facing ENZ and the international education sector that, if not proactively managed, could affect the success of the sector and the wider benefits to New Zealand from international education.

ENZ has a risk management and reporting framework that provides a consistent way to identify and assess the most important risks. We will:

- monitor the risks regularly through the Senior Leadership Team, Audit and Risk Committee and the ENZ Board
- revise, where necessary, the consequence and likelihood levels for any risk
- report any significant risks, and appropriate strategies to address them, to our Minister and our monitoring agencies as they arise.

We have identified ENZ's broad risks and mitigation strategies.

Risk	ENZ's mitigation strategies
Potential negative impact of the Christchurch terrorist attack in March 2019.	<ul style="list-style-type: none"> • Focus on strategic messaging that emphasises the themes of manaakitanga and global citizenship. • Use NauMai NZ to focus on the student experience and wellbeing, starting from when a potential international student first thinks about studying overseas. • Promote the quality of a New Zealand education in preparing students for the future.
Reduced student visa processing timeliness in 2019.	<ul style="list-style-type: none"> • Work to address the potential long-term impact of New Zealand being seen as less attractive compared to its competitors by focusing on the quality of the New Zealand education. • Work with ENZRA agents to maintain their support for New Zealand as a study destination. • Improve our understanding of Immigration New Zealand's risk profiling to better align our marketing strategies.
Changes to external factors that reduce the attractiveness of New Zealand's international education sector.	<ul style="list-style-type: none"> • Promote New Zealand as a world-class and high-quality destination. • Continue market diversification of New Zealand's international student attraction markets. • Monitor competitor countries' policies, practices and targets for international education.
Changes to the way education is delivered internationally.	<ul style="list-style-type: none"> • Work with the sector and Ministry of Education to identify emerging changes to the way education is delivered. • Build sector capability to respond to change. • Use existing digital assets and develop new digital assets to showcase New Zealand's overseas education and training offerings.
Government policy settings that reduce New Zealand's attractiveness to potential high-quality international students.	<ul style="list-style-type: none"> • Position the 'Think New' brand to create compelling reasons to study in New Zealand and promote New Zealand as a world-class and high-value destination. • Influence policy settings and ensure other government agencies understand the potential implications of policy settings.
Negative perceptions of international education.	<ul style="list-style-type: none"> • Tell the international education story in New Zealand. • ENZ's student experience approach. • Build greater awareness of the benefits of global citizenship.
Lack of trust in ENZ by the international education sector or other government agencies.	<ul style="list-style-type: none"> • Maintain a clear understanding of the sector's needs. • Ensure the sector understands ENZ's role and long-term strategy. • Monitor the quality of the products and services we deliver to the sector, and whether they meet the sector's needs.

Appendix One: Our statutory functions

ENZ's functions are specified in section 270 of the Education Act 1989. Our statutory functions are to:

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

Appendix Two: Glossary and abbreviations

ENZRA	Education New Zealand Recognised Agency
NZ Inc	The collaboration of New Zealand government agencies, particularly when operating overseas
Student mobility	Student mobility refers to students moving from their home country to another country (or countries) to study
TEOs	Tertiary education organisations which are made up of universities, institutes of technology and polytechnic and private training establishments

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