

Education New Zealand Manapou ki te Ao

Briefing to the Incoming Minister

February 2025

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Introduction

International education is a key plank in the Government's economic growth plan

International education is one of New Zealand's key export revenue generating sectors. International education generates jobs, supports the labour market, attracts and retains global talent, and enhances New Zealand's bilateral and multilateral relationships. Relationships created through international education support New Zealand's relationships with key trading partners and help develop opportunities for growth in many other sectors. Export revenue earnings from international education in the year to end of June 2024 totalled \$3.3 billion.

While New Zealand's international education sector recovery has been slower than in some other countries, enrolments have increased year on year since 2022 and as at August 2024, numbers had grown to 64% of pre-COVID enrolment levels (refer to Appendix 1). Some sectors are recovering faster than others with the university subsector showing the strongest recovery. English language providers and unfunded private training establishments are recovering slower than the rest of sector.

The global landscape is changing rapidly, presenting New Zealand's international education sector with both opportunities and challenges. Recently, many of the most popular destinations for international students introduced policies designed to reduce or limit the number of international students studying with them. This creates opportunities for New Zealand to showcase our quality providers and unique attributes to attract more international students. At the same time, new competitors are emerging, such as Malaysia and Singapore, meaning New Zealand must work hard across all key markets to retain its market share.

Role of Education New Zealand

Education New Zealand Manapou ki te Ao (ENZ) is a crown agent operating under section 511 of the Education and Training Act 2020 and is funded through Vote Tertiary Education.

Our name, Manapou ki te Ao, defines our part in enabling students to flourish and in creating the world's next generation of problem solvers:

- Manapou means supporting and sustaining life which allows growth and progression
- Ki te Ao is a call to action for us to take New Zealand's education to the world.

ENZ's core purpose is to raise awareness of New Zealand as a study destination and to influence the choice of students, to grow international enrolments. A small, but influential agency, ENZ is focused on delivering high-impact campaigns and events into key markets to support the international education sector and achieve the government's target to double exports value. ENZ focuses on the areas of greatest impact through its \$24.923 million crown funding (excluding Prime Minister's Scholarships for Asia and Latin America funding) including our offshore teams' work on government-to-government relationships, agent seminars and workshops, and facilitating in-market visits from providers. This work is all informed by our onshore data and insights capability, marketing expertise and sector engagement.

ENZ's strategy focuses on four goals:



Growing international student numbers



Partnering and connecting



Supporting sector capability development



Optimising ENZ

In delivering on this ambition, ENZ administers the Prime Minister's Scholarship for Asia and Latin America from Vote Tertiary Education and the Manaaki New Zealand Scholarship Programme, funded by the Ministry of Foreign Affairs and Trade, which play pivotal roles in building New Zealand's global brand and reputation as an international education destination. In the 2024/25 year to date, 119 individuals have been awarded Prime Minister's Scholarships for Asia and Latin America and 439 Manaaki New Zealand Scholarship recipients commenced their studies.

Your support through international Ministerial visits is of immense value to the growth of international education. There are a number of opportunities for you to engage with the international education sector domestically and internationally, s9(2)(f)(iv)

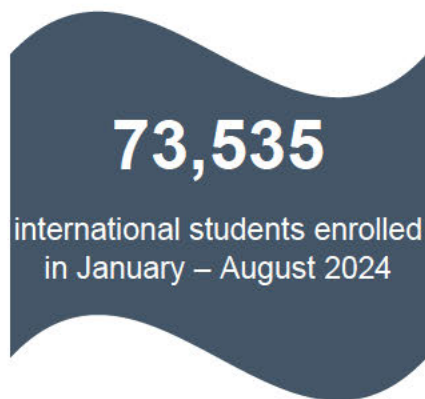
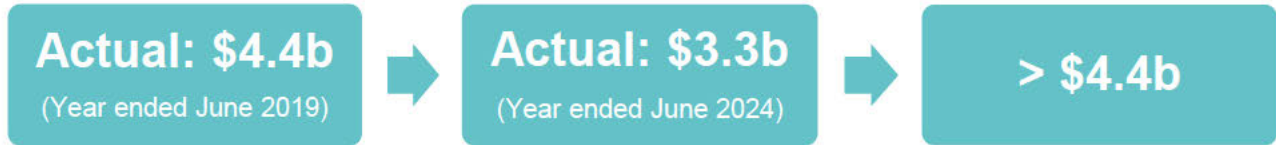
Finally, we welcome the opportunity to meet with you to discuss s9(2)(f)(iv), and to understand and explore your priorities for ENZ and how international education intersects with your other portfolios.

Tracey Bridges | Board Chair

Amanda Malu | Chief Executive

Key statistics

Ambition to grow the value of international education



Top source countries of international students

China
India
Japan
Republic of Korea
United States of America

86%

of international students had a positive rating of their overall experience (2024)

77%

of the international education sector valued ENZ's support (2023/24)

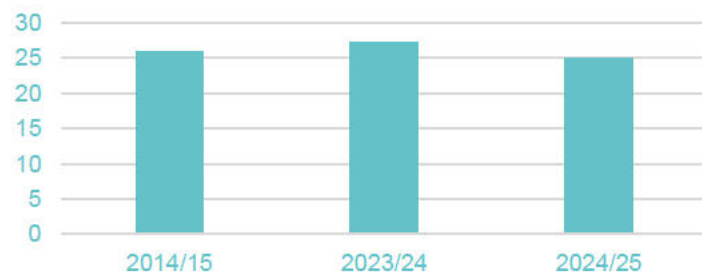
72%

of New Zealanders believe international students benefit New Zealand (2023/24)

119

Prime Minister's Scholarships for Asia and Latin America awarded (2024/25 year to date)

ENZ's funding 2014/15, 2023/24 and 2024/25 (\$m)



Opportunities and challenges facing New Zealand's international education sector

We welcome an opportunity to discuss these further with you.

International education is a key plank in the Government's economic growth plan

- International education was New Zealand's fifth-largest export in 2019. International students are returning to New Zealand, but there is room for more growth.
- January to August 2024 international student enrolments are at 64% of the 2019 full-year enrolments, but are 6% higher than the 2023 full-year enrolments. Full-year 2024 enrolment numbers will be available by the end of May 2025.
- ENZ alongside the sector is focused on growing the number of international students coming to New Zealand through evidence driven and targeted marketing and strategic government to government relationships.

The changing global landscape is ripe for New Zealand to attract more international students

- The international education landscape is changing with our traditional competitors (Australia, Canada and United Kingdom) tightening their immigration settings.
- At the same time, former target markets are emerging as competitors, such as Singapore, which has emerged as a key competitor since 2020.
- ENZ is being responsive to these changes in the global settings by developing targeted initiatives for New Zealand to attract talent, and there is more that could be done with strategic investment.

NEW ZEALAND MOST CLOSELY COMPETES WITH FRANCE, GERMANY AND JAPAN

STUDENTS: NEW ZEALAND COMPETITIVE BRAND HEALTH (GLOBAL)



	UNITED KINGDOM	UNITED STATES	AUSTRALIA	CANADA	NEW ZEALAND	FRANCE	GERMANY	JAPAN	SINGAPORE	CHINA	IRELAND	MALAYSIA
Spontaneous Awareness When you think about international education, which countries come to mind?	55%	59%	38%	37%	21%	29%	26%	26%	16%	16%	5%	3%
	-	-1	-2	+3	+8	-	-3	-5	-3	-3	-	-1
Prompted Awareness Which of these countries are you aware of as a possible study destination?	67%	66%	57%	56%	44%	43%	39%	37%	36%	20%	18%	14%
	+2	+1	-3	+3	+8	-1	-7	-10	-4	-3	-2	-2
Passive Consideration Which of these countries would you consider as possible study destinations?	50%	50%	39%	37%	31%	24%	22%	21%	21%	10%	10%	6%
	+4	+2	-2	+3	+10	-	-4	-6	-2	-1	-2	-1
Active Consideration^A How likely are you to study in: (NET likely / very likely shown)	46%	46%	35%	24%	28%	21%	19%	19%	18%	9%	6%	5%
	+6	+4	-1	+5	+12	+1	-3	-5	-1	-	-1	-1
Preference Please rank the countries below in terms of preference to study in (1 st place preference shown)	18%	25%	9%	10%	11%	4%	3%	5%	4%	3%	2%	1%
	+3	+1	-4	+2	+6	-1	-2	-5	-1	-	-1	-
Top 3 Preference	48%	48%	35%	32%	24%	18%	15%	16%	17%	8%	6%	5%

ENZ and the sector are collectively mobilising behind the Government's growth plan

- International education can play a pivotal role in attracting talent to drive the Government's growth ambitions.
- These efforts will ensure that New Zealand's global education brand continues to compete on the world stage.
- The immediate focus is for ENZ to increase awareness and preference for New Zealand as an education destination. Recent examples include:
 - ENZ is developing in-depth market plans to identify and prioritise growth opportunities.
 - ENZ is increasing the number of its offshore staff, including s6(a) [REDACTED]
 - ENZ completed a strategic assessment of the opportunities in GCC countries.

Other global trends impacting the future of international education present further opportunities

- Providers can differentiate their offering in response to growing competition, including through transnational education.
- Edtech and education services provide further opportunities to grow New Zealand's global brand and reputation. A recent example includes:
 - ENZ collaborated with EdTechNZ and New Zealand Trade and Enterprise to host webinars exploring opportunities, with specific emphasis on the Viet Nam, Australia and the Middle East markets.
- ENZ connects service providers to explore and leverage in-market opportunities. A recent example includes:
 - Neurofrog launching a joint venture with the Vietnamese OTB Healthcare Agency with revenue for the first stage forecast to be in the millions.

ENZ's funding baseline impacts its ability to deliver on the Government's economic growth plan

ENZ's static baseline over the last decade in the face of inflationary pressures

In 2014/15, ENZ's funding was \$25.855 million compared to \$24.923 million in 2024/25. This baseline funding excludes the ring-fenced funding for the Prime Minister's Scholarships for Asia and Latin America, Export Education Levy funding (which was ceased in 2019/20) and any one-off funding transfers.

ENZ receives funding through two Vote Tertiary Education appropriations to deliver its functions (excluding the costs associated with the Manaaki New Zealand Scholarship Programme administered on behalf of Ministry of Foreign Affairs and Trade):

- the International Education Programmes appropriation funds all ENZ's activities except for payments made to Prime Minister's Scholarships for Asia and Latin America recipients
- the Tertiary Scholarships and Awards appropriation funds recipients of the Prime Minister's Scholarships for Asia (started in 2013/14) and Latin America (started in 2016/17). The scholarships administration costs are funded through the International Education Programmes appropriation.

Summary of revenue and expenditure (\$000s)	2023/24 Actual	2024/25 Budget ¹
Revenue		
International Education Programmes	27,248	24,923
Tertiary Scholarships and Awards	3,560	3,750
Other revenue e.g. cost recoveries, interest	1,942	1,940
Total revenue	32,750	30,613
Total expenditure	32,742	30,613
Net surplus/(deficit)	8	-

As ENZ operates in 15 offshore locations, it experiences both domestic and international inflationary cost pressures. In addition, ENZ is also impacted by significant changes in New Zealand's exchange rate. It has limited ability to influence the cost of activities that are undertaken in these locations.

The Ministry of Foreign Affairs and Trade provides funding for ENZ to manage the operation of the Manaaki New Zealand Scholarship Programme.

¹ Statement of Performance Expectations 2024/25, ENZ (2024).

Implications of recent Budget decisions

Through Budget 2024, ENZ returned savings of \$2.35 million per annum from its International Education Programmes appropriation. This was a 9% permanent saving from the International Education Programmes appropriation.





s9(2)(f)(iv)

ENZ has recently completed its organisational restructure to ensure greater efficiency and effectiveness s9(2)(f)(iv) This has resulted in a total headcount of 94 full-time equivalents (including vacancies s6(a)).

ENZ remains committed to delivering on the Government's economic growth plan by growing international education export revenue through innovative marketing and engagement strategies.

s9(2)(f)(iv)

ENZ is focusing on areas of greatest impact through its funding

Focus	What it means	Key initiatives	Target
Grow international student numbers 	<ul style="list-style-type: none"> Grow the number and value of international students Diversify source markets 	Raise awareness and preference through: <ul style="list-style-type: none"> in-market events (student-facing fairs and education agent seminars) digital media campaigns public relations marketing and promotion with education Study with New Zealand website 	<ul style="list-style-type: none"> Maintain or increase brand awareness Diversify New Zealand's source markets for international education Maintain brand preference Maintain or increase number of leads to providers Increase in international student enrolments Increase the economic contribution from international education
Partner and connect 	<ul style="list-style-type: none"> Partner with the sector and NZ Inc to grow international student numbers 	<ul style="list-style-type: none"> Leverage ENZ's in-market presence, knowledge and connections for the benefit of New Zealand Foster connections via government-to-government partnerships (refer to the Case Study on page 11) Deliver analysis, intelligence and insights about international education Operate promotional scholarships, Prime Minister's Scholarships for Asia and Latin America, and the Manaaki New Zealand Scholarship Programme 	<ul style="list-style-type: none"> ENZ's international education insights are valued by the international education sector and NZ Inc agencies International education's contribution to the Export Double strategy is delivered
Support sector capability development 	<ul style="list-style-type: none"> The sector grows value 	<ul style="list-style-type: none"> Promote and deliver a suite of services that enable the sector to grow in value Leverage research and insights 	<ul style="list-style-type: none"> ENZ's support is valued by the international education sector
Optimise ENZ 	<ul style="list-style-type: none"> Be an efficient and effective organisation 	<ul style="list-style-type: none"> Improve market-sector connections Rebalance ENZ's onshore and offshore resourcing Flatten ENZ's organisational structure 	<ul style="list-style-type: none"> Be an efficient and effective Crown Agency

More information about ENZ's activities can be found in the [Statement of Performance Expectations 2024-25](#) and [Annual Report 2023/24](#).

Case study: Strengthening education connections for economic growth

China is the New Zealand's largest source of international students (25,175), representing 34% of international students enrolled in New Zealand in January to August 2024. The largest number of the Prime Minister's Scholarship for Asia recipients (858 since 2013) also travel to China for study or internships.

In the year ended June 2024, New Zealand exported \$1.2 billion of education related travel to China, representing 43.5% of all services exported from New Zealand to China.²

International education is a key plank in the bilateral relationship with China, and China remains a key market for New Zealand education providers. The many institutional relationships and formal arrangements between education providers support student mobility and establish new institutional partnerships leading to academic exchange and research collaboration.

Impact on international student enrolments

In January to August 2024, 25,175 Chinese international students were enrolled with New Zealand education providers. Most (14,715) were enrolled at universities, followed by 6,040 at schools, 2,035 at Te Pūkenga/New Zealand Institute of Skills and Technology, and the rest at private training establishments and English language providers.

ENZ has facilitated these opportunities over the last 24 months

New Zealand – China High-level Education Forum

The inaugural New Zealand – China High-level Education Forum was held in June 2024. This government-to-government initiative strengthened our key relationships with Chinese government agencies, including China Ministry of Education and China Center for International People to People Exchange.

The Education Forum convened major university representatives from both countries, including leaders of all eight New Zealand universities and China's top 10 universities. Around 20 new arrangements were signed between New Zealand universities and their counterpart organisations in China. This university sector collaboration promotes student mobility and establishes new institutional partnerships leading to export growth, academic exchange, and research collaboration.

Strengthening vocational education relationships

Under a Memorandum of Arrangement between Te Pūkenga/New Zealand Institute of Skills and Technology and China Centre for International People-to-People Exchange, seven partnerships have been established between New Zealand and Chinese vocational education institutions.

² https://statisticsnz.shinyapps.io/trade_dashboard

Provider case study: Lincoln University

On 22 August 2024, the first cohort of Huazhong Agricultural University students (221 enrolled) started studying Bachelor of Viticulture and Oenology, Bachelor of Science (Conservation and Ecology) and Bachelor of Commerce (Horticulture) at Lincoln University. This intake of students is part of the Joint Institute between Lincoln University and Huazhong Agricultural University that will have a total enrolment capacity of 1,000 students in four qualifications: Master of Environmental Management, Bachelor of Science Conservation and Ecology, Bachelor of Viticulture and Oenology, and Bachelor of Commerce (Horticulture). The Joint Institute agreement was signed during the New Zealand – China High-level Education Forum.

Plans for 2025

New Zealand will be the Country of Honour at the China Annual Conference and Expo for International Education (CACIE) on 29-31 October 2025. Being the Country of Honour offers significant opportunities to showcase New Zealand education through a strong in-person presence, New Zealand-focused events, cultural performances and media engagements. A full delegation of education providers will attend including all universities, Te Pūkenga/New Zealand Institute of Skills and Technology, private training establishments, and schools. It will increase recognition of New Zealand education, and on the global stage as CACIE welcomes an international audience with education representatives from all over the world.

ENZ will have a national pavilion at the China Education Expo on 31 October - 1 November, the student facing and business-to-business fair that complements CACIE. The Expo is expected to attract around 25,000 visitors from 38 countries, with many more attending CACIE. ENZ will also hold agent seminars for New Zealand education providers to engage with education agents and other stakeholders in Guangzhou, Beijing and Shanghai in March 2025.

As a result of New Zealand featured as Country of Honour at CACIE 2025, ENZ expects increased Chinese student enrolments in the schools, vocational education and English language subsectors in 2026.

Engaging with ENZ

ENZ provides you with monthly and quarterly reports as regular updates about our work and progress towards achieving the strategic intentions as outlined in ENZ's *Statement of Intent 2023-2027* and *Statement of Performance Expectations 2024/25*.

'No surprises' principle

We operate under a 'no-surprises' principle. This means we will keep you well-informed of matters of significance within your portfolio responsibilities that relate to ENZ and our role.

Meeting with ENZ

Tracey Bridges, as the ENZ Board Chair, along with Amanda Malu, ENZ's Chief Executive, would like to discuss the points raised in this briefing with you. ENZ will work with your office to organise this meeting.

The ENZ Board Chair and Chief Executive would like to request monthly agency/Minister meetings.

Upcoming reports/briefings to the Minister

Title	Timing	Rationale
ENZ Monthly Report: February 2025	February 2025	<ul style="list-style-type: none"> Provide update on ENZ's goals and objectives
Domestic engagement opportunity: Peak Body Forum	March 2025	<ul style="list-style-type: none"> Opportunity to engage with international education peak bodies
ENZ Quarter Report for October to December 2024	March 2025	<ul style="list-style-type: none"> Summarise progress toward ENZ's broader strategic goals, assessing the impact of initiatives across various markets
s9(2)(f)(iv)		
Draft <i>Statement of Intent 2025-2029</i> and <i>Statement of Performance Expectations 2025/26</i>	End of April 2025	<ul style="list-style-type: none"> Seek Ministerial feedback on draft documents to meet statutory requirements in the Crown Entities Act 2004

Upcoming media opportunities

ENZ will liaise with your office when we identify potential international education-related media opportunities.

Title	Timing	Reason
<i>E-News</i> newsletter	February 2025	<ul style="list-style-type: none"> Discuss your international education priorities in a newsletter targeted to New Zealand's international education sector

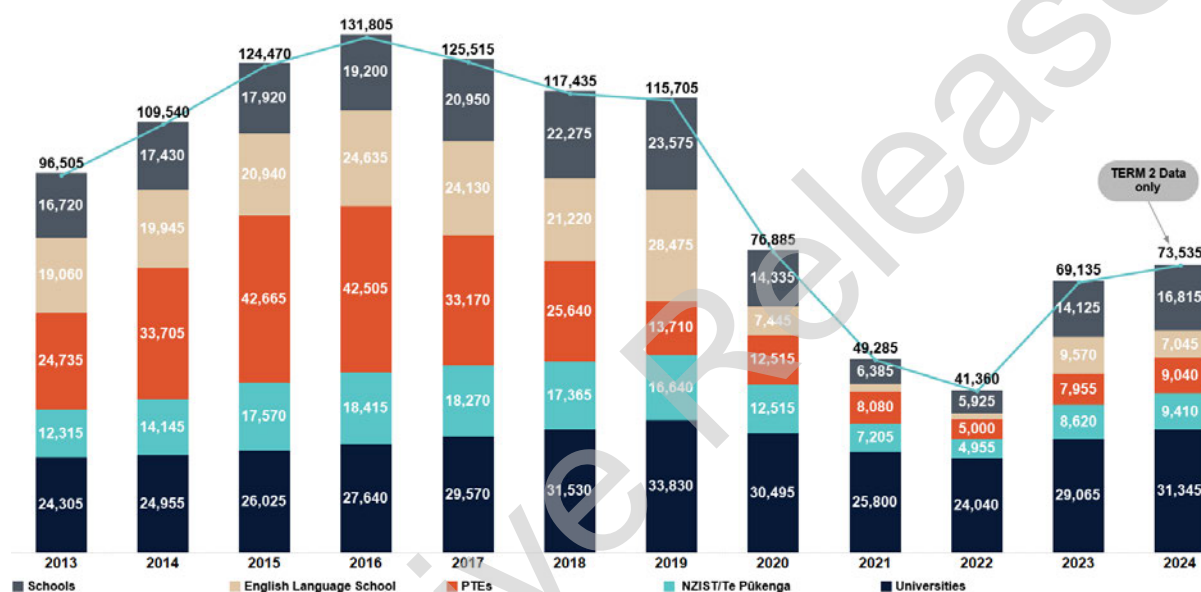
Other agencies reports that ENZ has contributed to

Lead agency	Minister	Title
MFAT	Prime Minister	Mission to Viet Nam s6(a) , February 2025
MFAT	Prime Minister	Mission to India, March 2025
MBIE	Willis	Economic Growth Plan

Appendix 1: International student enrolments

- In January to August 2024, 73,535 international students were enrolled to study in New Zealand, a 24% increase from the same period in 2023 and a 6% increase on the end of year numbers.

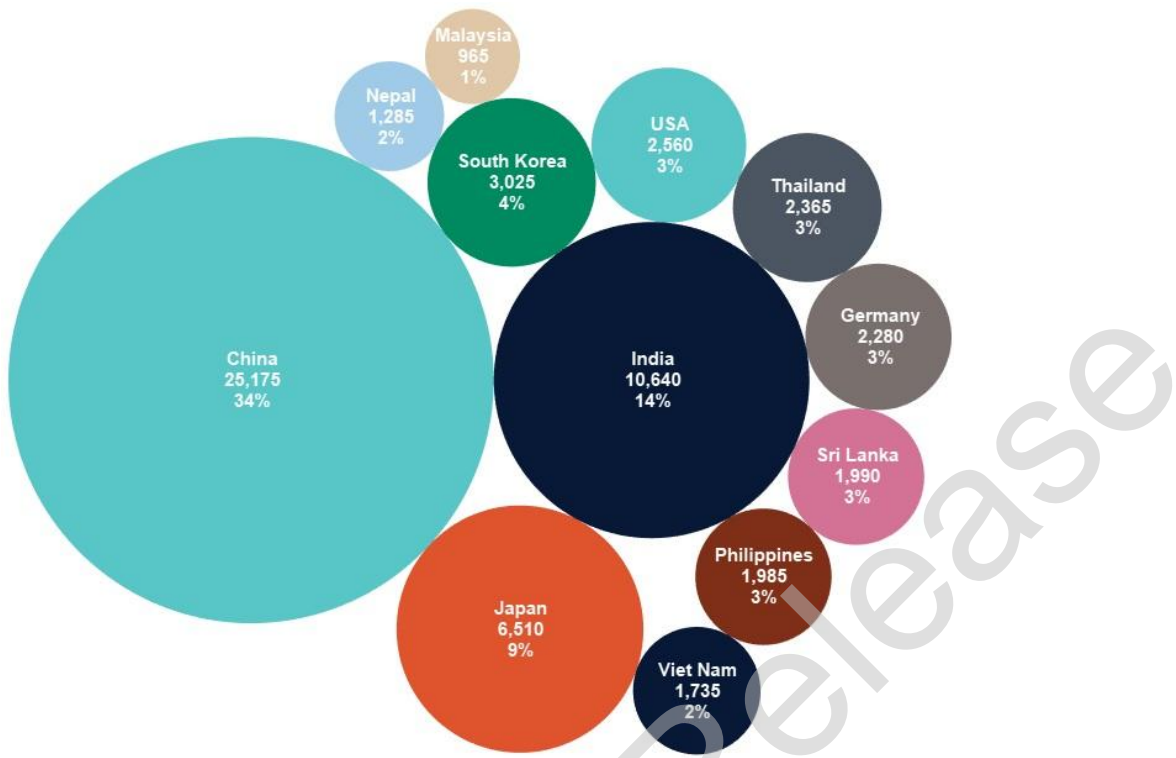
Number of international student enrolments by subsector (2013-2023 full year and January to August 2024)



Source: Ministry of Education Enrolment Data 2013-2024.

- Universities (with 31,345) and schools (with 16,815) remained New Zealand's two largest subsectors for international student enrolments. Together they comprised 65% of total enrolments. In 2019 the university and school subsectors comprised 50% of total enrolments.
- Growth was also strong for Te Pūkenga/New Zealand Institute of Skills and Technology with 9% more students than the full year 2023.
- The school subsector recovery has been strongest in primary schools with a 69% increase from 1,950 to 3,300.
- China remained New Zealand's top student source country with 34% of enrolments, followed by India (14%), Japan (9%), South Korea (4%), United States of America (3%), Thailand (3%), Germany (3%), Sri Lanka (3%), and the Philippines (3%). All other source countries accounted for 2% or fewer students.
- Like for New Zealand, China continued to be the largest source market for international students for our competitor countries too.

Number and proportion of international students enrolled by top source countries (January to August 2024)



Source: Ministry of Education Enrolment Data 2013-2024

Appendix 2: ENZ's functions

ENZ's functions are outlined under section 511 of the Education and Training Act 2020, and are outlined below:

Promoting New Zealand education offshore

- deliver strategies, programmes, and activities for promoting – together with providers and other government agencies – New Zealand education overseas
- promote New Zealand as an education destination for international students
- promote the provision of New Zealand education and training services overseas.

Managing international education activities for the Government

- manage, in collaboration with other government agencies, activities undertaken by representatives
- appointed to act on behalf of the New Zealand Government in relation to international education
- administer any international programmes or activities that are consistent with the Government's policy on international education
- work with other agencies to ensure international students are adequately supported while living and studying in New Zealand.

Undertaking research and advice

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

Providing information to international students in New Zealand

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

This section of the Act defines providers as any organisation that provides education, training, or education-related services.

Appendix 3: ENZ's Board

Tracey Bridges | Board Chair



Tracey is a professional director with a background in strategy, leadership, marketing and behaviour change.

She is a co-founder and director of social enterprise The Good Registry, and a co-founder and former owner of trans-Tasman communications consultancy business SenateSHJ.

Her governance portfolio includes serving as Chair of the Wellington Regional Economic Development Agency, and as a member of the boards of Whānau Āwhina Plunket, WELLfed Charitable Trust, the Wellington Regional Stadium Trust, and the Digital Media Trust. She also serves as a volunteer adult literacy tutor.

Tony Gray | Deputy Chair

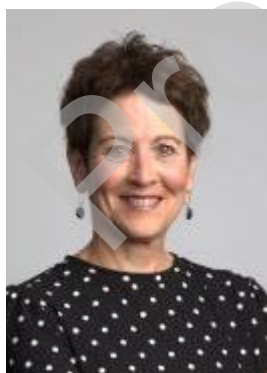


Tony Gray has had a career in education spanning over 37 years across New Zealand and the United Kingdom. Tony is a former Chief Executive of NMIT and Ara Institute of Technology.

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

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

Dr Therese Arseneau | Board Member



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

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

Dr Erik Lithander | Board Member

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

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

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

Lyn Provost | Board member

Lyn Provost was Controller and Auditor-General from October 2009 until 2017. From 2001 to 2009, she was the Deputy Commissioner of New Zealand Police.

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

Dr Linda Sissons | Board Member

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

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

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

Daniel Wilson | Board Member

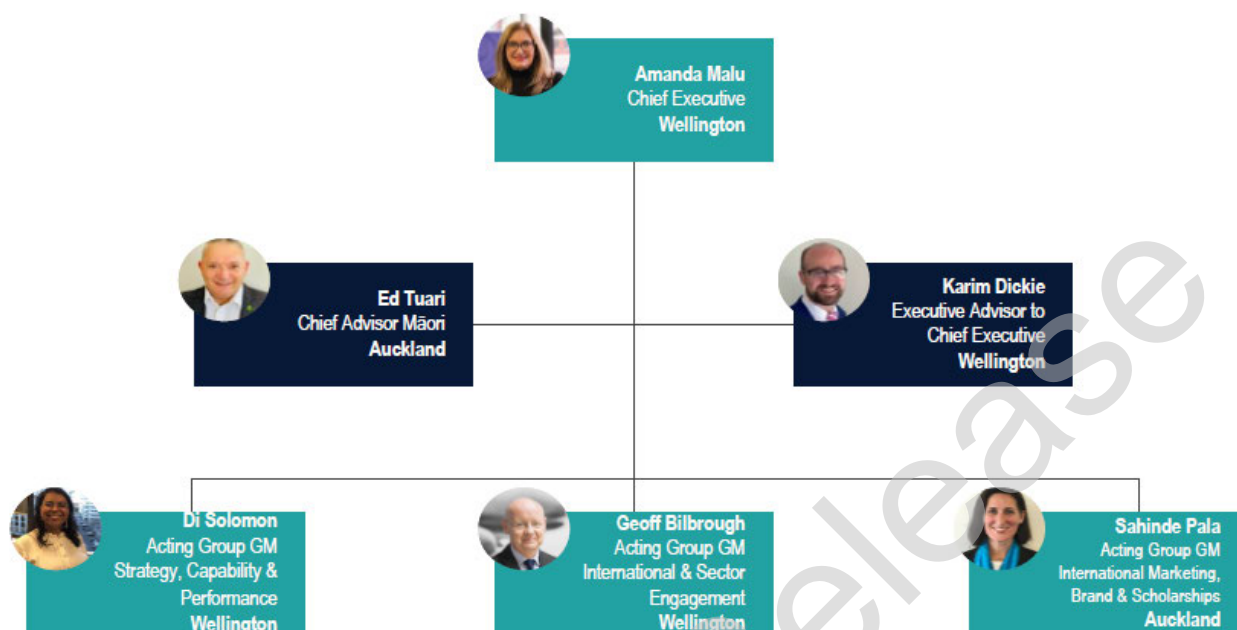


After positions at several schools in Auckland and London, Daniel Wilson was appointed to the Leadership team at Manurewa High School in 2007, firstly as Deputy, then Associate Principal.

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

Proactive Release

Appendix 4: ENZ's Leadership Team



Amanda Malu | Chief Executive

As ENZ's Chief Executive, Amanda Malu is responsible for leading ENZ in promoting New Zealand as a study destination to increase the value of international education to New Zealand.

Amanda has deep experience in the public sector, education, and marketing, as well as experience across borders and with international education through her past roles. She has held senior leadership roles across education and health sectors.

Prior to ENZ, she was Deputy Chief Executive Service Delivery at ACC, and formerly Chief Executive at Whānau Āwhina Plunket, leading the organisation through extensive change over five years in the role. She has also held senior marketing and communication roles, including at the Tertiary Education Commission and in the vocational education sector.

Geoff Bilbrough | Acting Group General Manager International and Sector Engagement

The group delivers ENZ's strategy in market through partnership development and promotional activities, as well as building mutually beneficial relationships with international governments, education providers and other partners. It also leads and partners with education agents and delivers events that support the education export and student attraction strategy.

Geoff Bilbrough is a senior corporate communications and marketing practitioner with a proven record of advising and delivering programmes for clients in the private and public sector. His experience includes 10 years with Sweeney Vesty Limited; 10 years with an integrated marketing communications agency in London; six years as the General Manager of the Hong Kong office of FleishmanHillard and a period at Acumen in Wellington.

Sahinde Pala | Acting Group General Manager International Marketing, Brand and Scholarships

The group is responsible for providing a strategic approach to planning and optimising marketing, ENZ's brand, campaigns, channels and social license. It is also accountable for the delivery of the Manaaki New Zealand Scholarship Programme, and other international scholarships, including the Prime Minister's Scholarships and promotional scholarships.

Sahinde Pala joined ENZ in 2016 after 18 years working for a multinational group of English language schools. With a career dedicated to international education, she brought extensive private sector experience in international marketing, stakeholder engagement and student experience delivery to the organisation. Sahinde is based in our Auckland office.

Di Solomon | Acting Group General Manager Strategy, Capability and Performance

The group is responsible for ENZ's strategic development and direction including strategy, planning, performance, and insights. It is also responsible for ENZ enabling and corporate services, including finance, people, safety and wellbeing, IT, government relations and communications.

Di Solomon is a public sector leader with over 17 years' experience working across a number of central and local government agencies. Her aim is to ensure New Zealand's international education sector is sustainable, globally connected and provides an excellent education experience. Formerly an international student, Di holds a Masters in Environmental Policy from Lincoln University.

Ed Tuari | Manukura Chief Advisor Māori

Ed Tuari is of Ngāti Porou and Te Whanau-ā-Apanui descent and joined ENZ in 2017. He previously worked in Dubai, United Arab Emirates for 18 years. A former primary school teacher for 10 years, Ed has experience in providing Māori bi-lingual and immersion learning within the New Zealand primary school sector. Recently Ed was the Kaipupuri-Cultural Advisor of the New Zealand Pavilion, entrusted with Kaitiaki o te mouri for Expo 2020 Dubai.

Appendix 5: Map of ENZ's locations



Appendix 6: Glossary

Term	What it means
CACIE	China Annual Conference and Expo for International Education
Edtech	Education technology
EdTechNZ	EdTech New Zealand, the peak body for education technology businesses
ENZ	Education New Zealand Manapou ki te Ao
GCC	Gulf Cooperation Council
International education providers or education providers	This term is used to describe New Zealand's English language schools, Te Pūkenga/New Zealand Institute of Skills and Technology, private training establishments, schools and universities
International education sector or the sector	New Zealand's international education sector is made up of English language schools, schools, Te Pūkenga/New Zealand Institute of Skills and Technology, private training establishments, universities, wananga, education businesses (e.g. education technology, education publishing), education agents and New Zealand government agencies
International students	<p>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 offshore.</p> <p>ENZ counts international PhD students, exchange students, NZ Aid students (including Manaaki Scholarship students), foreign research postgraduate students and full fee-paying international students as international students</p>
MFAT	Ministry of Foreign Affairs and Trade
NZ Inc	The collaboration of New Zealand government agencies, particularly when operating offshore. This includes agencies such as ENZ, Immigration New Zealand, Ministry of Foreign Affairs and Trade, and New Zealand Trade and Enterprise
Student mobility	Students crossing geographical borders to obtain a portion or all of their education in a country other than their own.