

**THINK  
NEW<sup>®</sup>**



# Education New Zealand

Quarterly Report for 1 April to 30 June 2022

Proactive Release



---

## Contents

<b>Executive Summary</b> .....	<b>3</b>
International education operating context.....	3
ENZ operating context.....	4
<b>Work undertaken in quarter four</b> .....	<b>5</b>
Tono.....	5
Supporting the sector.....	5
Supporting students.....	8
Promoting New Zealand’s education brand.....	10
Pono.....	12
Supporting the sector.....	12
Diversifying products and services.....	12
Hono .....	13
Global citizens .....	13
Kono.....	15
Refreshed NZIES.....	15
Supporting decision making across government.....	15
ENZ’s Fit for Purpose changes to support government and sector priorities .....	15
Risks and Issues Management.....	16
<b>Financial performance to 30 June 2022</b> .....	<b>17</b>
Seed funding investment across the regions for selected projects across social licence, student experience and long-term retention was delivered in June. ....	18
In-market agent co-investment was delivered, and new digital development activity funded in June. ....	18
<b>ENZ’s Impact, Performance and Organisational measures</b> .....	<b>19</b>
Impact measures .....	19
Performance measures.....	19

---

## Executive Summary

---

The final quarter of the 2021/22 year saw a marked shift towards demonstrating that New Zealand is 'open for business' for international education. Following significant changes to ENZ's operating environment in quarter three, we focused on delivering and planning initiatives that would support this shift ahead of New Zealand's borders fully reopening as of 1 August 2022.

During the fourth quarter, ENZ planned for and delivered initiatives that sat within its more familiar remit. This included the launch of a global marketing campaign to promote New Zealand (stepping forward from protecting the brand, as it was for the rest of the year). We also stepped up our in-person presence at international education events such as NAFSA in the United States, and Expo 2020 Dubai (which took place this year). Over the quarter, we have also been working on planning and organising the 29<sup>th</sup> five-day virtual New Zealand International Education Conference Ki tua, our first conference since 2019. More recently, we published a reworked calendar of ENZ's international engagement for the rest of the 2022 calendar year. This work will continue to increase in pace and investment as ENZ leans into Goal One of the refreshed New Zealand International Education Strategy (NZIES).

A key activity in the quarter was your travel to the United States for NAFSA, and to Latin America to support the profile of New Zealand in two key countries (Brazil and Chile). There has been ongoing engagement following this visit, and looking forward, we continue to plan for further Ministerial travel in the 2022 calendar year.

A significant milestone was the relaunch of the Prime Minister's Scholarships for Asia and Latin America, with the first round since 2019. Applications were taken during March and April 2022. Alongside this push to support New Zealanders to gain their own international education experience, during the quarter, ENZ signed a contract with the Ministry of Foreign Affairs and Trade to take over the operational management of the New Zealand Manaaki Scholarship Programme. The Programme represents the Government's single largest investment in international scholarships and represents a significant lever to contribute to achieving the goals of the NZIES. Work is already underway, and detailed planning continues to ensure a smooth transition.

We progressed work through the diversification workstream, specifically supporting the capability of the sector to develop new education products and services via the Product Innovation Fund. Recipients were finalised by the end of the quarter, and ENZ has announced this in the week beginning 15 August.

Crucially, the finalisation of the refreshed NZIES during the quarter provides a clear framework of outcomes for agencies to deliver to support the rebuild of the sector as we move forward. You launched the refreshed NZIES at the New Zealand International Education Conference in August 2022.

---

## International education operating context

---

As the world adapts to living with COVID-19 and air connectivity increases, we expect to see greater demand for an international education experience. Destination countries are managing this in a variety of ways, and with varying degrees of success. As one international education professional stated to the Minister of Education during his visit to the United States in May 2022, the demand for an international education experience has been deferred, not deterred.

## ENZ operating context

---

ENZ's ability to demonstrate its impact and achievement against its performance measures reflects some of the ongoing challenges within the sector. For example, the International Student Experience Survey operated at a much smaller level than in previous years due to the small number of international students in New Zealand, and therefore the results are not directly comparable with previous years. Equally, obtaining accurate and timely enrolment data for the 2021 year has been more difficult than in previous years, due to the impacts of COVID-19 on unfunded education providers. This means the results for some of ENZ's impact and performance measures are not directly comparable to previous years. Where this is the case, we have indicated this in the comments.

We continued to deliver against our strategic four-year plan 2021-2025, which focuses on the following strategic objectives:

- **Tono/invitation:** Aotearoa New Zealand's unique education offerings and services are highly sought after by international learners
- **Pono/integrity:** Aotearoa New Zealand delivers high-quality and diverse education experiences that are sustainable, globally competitive and deliver value to all involved
- **Hono/global connections:** Aotearoa New Zealand makes the best possible use of its international education expertise to improve educational outcomes, establish partnerships and grow global connections
- **Kono/nourishers:** ENZ's core capabilities nourish the organisation and support the delivery of all Strategic Objectives under the Four-year plan.

This report summarises ENZ's performance in delivering its strategic priorities during the 2021/22 financial year. These priorities were developed to align with the *New Zealand International Education Strategy 2018-2030* (NZIES), which was refreshed during the quarter. We expect the refreshed NZIES to take effect during the 2022/23 financial year. ENZ's performance for 2021/22 was assessed against ENZ's *Statement of Intent 2019-2023*, *Statement of Performance Expectations 2021/22*, ENZ's Business Plan 2021/22 and the Letter of Expectations from Minister Hipkins.

ENZ's objectives incorporate the outcomes of the Government's Strategic Recovery Plan for International Education (the Recovery Plan), embedding the workstreams as part of our 'business-as-usual' as we move towards the objectives in our Statement of Intent 2022-2026 (SOI). During the quarter, we finalised our SOI for 2022-2026, which aligns with the refreshed New Zealand International Education Strategy 2022-2030 (NZIES).

### *ENZ delivery against Letter of Expectations*

Our engagement with relevant government agencies this Quarter has supported the implementation of Cohort 4, supporting the refresh of the NZIES and providing an international education perspective into a number of policy considerations. We have also worked with Immigration New Zealand, in particular, to understand how international education fits within their operating context.

Following Karl Wixon's (ENZ's Kaitohu Matua Māori / Chief Advisor, Māori) well attended Māori relationship building kōrero at the ITENZ Conference in September 2021, ITENZ invited Karl to participate in a panel conversation 'PTE Māori Relationship building – know-how and know who' with PTE providers already on this journey – such as EcoQuest and ARA. The goal was to share experiences and considered practical ways to build enduring relationships with Māori that support providers, taura (teachers) and ākonga (students) to confidently embed tikanga and te ao Māori as

Te Tiriti partners. Mutual respect and interests were described as the bedrock to enduring Māori relationships.

### *Other considerations*

The Omicron outbreak and its effects on ENZ staff continued to create challenges for both onshore and offshore staff during this Quarter. Despite all staff being vaccinated, over half have now contracted the virus and many have been confined to their place of residence either because of government requirements or because of exposure to others with COVID-19. We have continued to enable a flexible working model, with most staff mixing office and home-based working as they see fit. We have made kitset sit/stand desks available to staff for home use and have ensured staff have adequate paid leave while recovering from COVID-19.

---

## Work undertaken in quarter four

---

### Tono

---

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

### Supporting the sector

The reopening of New Zealand's borders provided the opportunity for the sector to reconnect with education partners and to restart some of its pre-COVID-19 activities to promote student mobility. ENZ also worked closely with other agencies to support the entry to New Zealand of the fourth cohort of international students.

### *Cohorts update*

ENZ continued to take a lead role in the implementation of Cohort 4. Following the allocation of the sub sector places to individual providers, ENZ worked with the MOE to ensure all places were used and had approved nominations. When the Request for Travel process was opened by INZ on 13 April, 1,750 nominations had been approved. The cohort nomination process was completed in mid-June when 5,000 nominations had been approved. Providers worked together to help ensure all places were filled with travel ready students. The final distribution to sub-sectors was:

Schools	Universities	Te Pūkenga	ELS	PTEs	Total
946	1,624	748	785	897	5,000

Regular updates were emailed to providers and weekly 'drop in' Zoom meetings were held to answer questions and help resolve any issues. In addition to working closely with the MOE, ENZ staff worked closely with INZ to help ensure students progressed through the border class exception process. Regular reporting was developed with INZ to demonstrate the progress of the cohort. The table below shows the progress as at 28 July 2022.

<b>Step in student selection and visa application process</b>	<b>Total</b>
<b>Number of nominated students</b>	5,000
RFTs approved (ITA'd for a visa)	4,866
Students yet to submit a RFT (or with a RFT in progress)	134
<b>Student Visa applications received</b>	4,533
Visa applications under assessment	532
Student visa applications approved or approved in principle	3,515
Student visa applications declined or withdrawn	486
<b>Students who have travelled to NZ after visa granted</b>	<b>2,462</b>

Students from 109 different countries (nationalities) were nominated for Cohort 4. A breakdown of main student nationalities is shown below.

<b>Cohort 4 student nationality</b>	<b>Students nominated</b>
China	1461
India	905
Thailand	266
Germany	198
Japan	189
Philippines	166
South Korea	161
Malaysia	152
Sri Lanka	150
Vietnam	147
Brazil	98
Canada	96
Hong Kong	79
Nepal	79
Indonesia	71
United States of America	68
Chile	59
Colombia	57
Iran	50
Taiwan	37
Singapore	32
Students from nationalities with 30 or fewer students nominated	436
<b>Total</b>	<b>5000</b>

The collaboration between the ENZ and the MOE to implement Cohort 4 was very positive. It combined complementary policy and operational expertise and utilised positive sector relationships built up over several years by ENZ. The Cohort 4 team model which saw collaboration at the early stages of design has potential to be replicated for future initiatives.

### *ICEE*

ENZ and New Zealand providers were among 250 exhibitors from 21 countries at the ICEE 2022 in Riyadh, promoting New Zealand's education offering across the education technology, English language and tertiary sectors. The New Zealand pavilion hosted representatives from University of Otago, Victoria University of Wellington and University of Waikato as well as two English language

providers and four EdTech companies. ENZ also met with the Saudi Technical and Vocational Training Corporation to discuss potential cooperation opportunities for Te Pūkenga.

### *Reconnecting with education agents at ICEF*

ENZ attended the 15th annual ICEF Australia New Zealand (ANZA) global conference from 14-17 June along with a representative from INZ. ANZA connects New Zealand providers with ICEF approved education agents from around the world. ANZA is held in New Zealand every three years. ENZ's staff member was a guest panellist during the opening plenary session 'Study Destinations: Australia and New Zealand back in the game'.

Seventeen New Zealand education providers attended (one university and 16 secondary schools). Agents who attended have demonstrated a particular interest in promoting New Zealand and Australia, and are keen to reconnect.

There were 463 participants, including 182 education agents representing 61 countries. The top five countries represented were Brazil, Colombia, India, Nepal and Viet Nam.

The ENZ / INZ booth received a steady flow of visits from agents. The majority of questions covered how agents could send students to New Zealand, or how they could become an ENZ recognised agency.

### *New Zealand International Education Conference Ki Tua*

Planning for the 29<sup>th</sup> New Zealand International Education Conference was well underway during this quarter. The conference was hosted virtually on the EventsAIR platform from Monday 15 to Friday 19 August.

The theme was *Towards Recovery: Reflect, Reconnect and Renew*:

- reflecting on the past two years of COVID-19 and what positives the sector can take forward (day 1)
- getting up to speed with New Zealand's plans to reconnect with the world and what international markets are now seeking (day 2/3)
- renewal, and how New Zealand's international education sector can renew our offerings for the future.

The conference also incorporated sessions which addressed ENZ's commitment to Te Tiriti o Waitangi, international student experiences, and inspiring alumni stories.

### **New te reo Māori ingoa**

ENZ developed a new te reo Māori ingoa (name) for the conference - **NZIEC Ki Tua**.

**NZIEC | KI TUA**

NEW ZEALAND INTERNATIONAL EDUCATION CONFERENCE | TO THE FUTURE

Ki Tua takes inspiration from the whakataukī: *He rā ki tua*, which can be translated as 'Look positively toward the future, better times are coming.' Ki Tua is not about returning to the 'status quo'. It is about reconnecting to the world, finding a fresh perspective and taking a new approach.

## Underpinning values

ENZ took a Māori-led approach to the development of the new name and worked with Māori-owned creative agency, RUN, to bring this to life. From the outset, we considered and incorporated these values which we considered important for the NZIEC kaupapa:

- Hononga: Connections
- Māramatanga: Enlightenment
- Wero: Challenge
- Ārahitia: Direction/Leadership.

## Extending the existing brand

The new name will be used alongside the well-known NZIEC brand as *NZIEC Ki Tua*. In sitting alongside the existing NZIEC brand, the ingoa Māori extends its value proposition and makes it more purposeful. It speaks to the value of the NZIEC as New Zealand's pre-eminent annual event for international education in preparing for the future.

### *International Education Peak Bodies Forum Meeting*

ENZ hosted the first in person international education peak bodies forum in more than six months on 22 June. Attendees included peak body representatives, INZ, MoE, and NZQA. The agenda included:

- an update from ENZ and MOE on Cohort 4 implementation
- a discussion on the refresh of the New Zealand International Education Strategy (NZIES) (led by the sector)
- updates from INZ including their preparations for the border reopening
- a debrief on your visit to the United States and Latin America from ENZ and MoE
- an update on planned changes to offshore delivery rules from NZQA.

Peak body representatives were positive about the general alignment between sector and government priorities within the NZIES. There was constructive discussion about the areas where alignment was not as strong, including the level of focus on diversification and the low number of actions relating to recruitment of students. A specific action was for further consideration of developing the Pathway Visa. Peak body representatives expressed a desire to contribute to a shared implementation plan for the refreshed NZIES.

In relation to the update from INZ, there was also discussion about training for education agents relating to visa applications, notifying providers as well students when there are application issues (especially within Cohort 4), and having clear timeframes/targets for the assessment of applications.

## Supporting students

ENZ continued to support students in a relevant and targeted fashion throughout the quarter. [NauMai NZ](#) remains the 'go to' trusted information resource for international students and we continue to update the pages that are dedicated to the Government's COVID-19 response regularly, including key information around border settings, COVID-19 testing and vaccine regulations. We worked with the sector to support both the processing and welcoming of international student cohorts to New Zealand. For Cohort 4, ENZ distributed 5,000 Tū Ngātahi pin-packs to education providers across the country to support the arrival of these students. ENZ is encouraging providers and economic development agencies among others, to celebrate and share the stories of these students using the hashtag, #TūNgātahi.



ENZ continues to engage with the New Zealand International Students' Association as well as other student associations to support international student wellbeing and engagement in New Zealand.

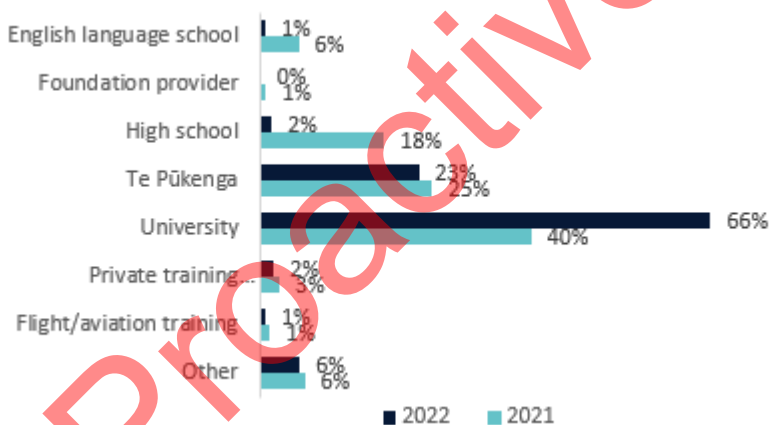
### *International student experience survey for 2021/22*

ENZ decided to undertake a pulse survey instead of a comprehensive International Student Experience Survey during the 2021/22 year due to New Zealand's ongoing border restrictions. Very few new international students entered New Zealand during 2021/22, and existing student numbers were at historic lows. ENZ determined that this would have impacted sample numbers for the survey and therefore also the results.

As a trial, we conducted a 'pulse' International Student Experience Survey towards the end of June 2022 using ENZ's NauMai database. This provided contact details for 3,418 individuals. We received 1,236 responses, however more than half of these were disqualified as they did not meet the criteria for participating in the survey. Of the 1,236 that started the survey:

- 50 were disqualified after question one as they indicated they were New Zealand citizens
- 43 were disqualified after question two, as they said they had never studied with a New Zealand education provider
- 632 were disqualified after question three as they had finished their studies with a New Zealand education provider more than six months earlier.

The sector profile of the respondents was very different to that of a comprehensive International Student Experience Survey, as the NauMai NZ database has very few registrations from high school and current English Language school students. The difference in sector profile between the pulse survey 2022 and the survey undertaken in 2021 is as follows:



#### Key results from 2022 pulse

- Current onshore Te Pūkenga-based students: 85% rated their overall experience in New Zealand so far as 6-10 on a scale of 1-10 (80% in 2021 and 85% in 2019). This change is not significant.
- Current onshore university-based students: 75% rated their overall experience in New Zealand so far as 6-10 on a scale of 1-10 (89% in 2021 and 89% in 2019). This is a significant decrease.

University students were most positive about education quality and experiences. There is consistency with previous survey results in the areas where New Zealand rates less favourably, such as cost of living and issues pertaining to visas. Given the significant increase in the general cost of living over the past 12 months, it is unsurprising that this has been raised and has contributed to the drop in overall student satisfaction.

ENZ will share these findings with the education sector as appropriate in the coming months. We will use the findings to shape ENZ's focus areas relating to student experience. These findings will also inform content evolution on the NauMai NZ platform.

## Promoting New Zealand's education brand

As New Zealand eased its COVID-19 and travel restrictions, ENZ shifted its focus from protecting New Zealand's education brand to promoting the brand. This reflects the strong focus in Phase One of the refreshed NZIES towards student mobility. We anticipate this focus to continue throughout the 2022/23 year, and this is reflected through our resource and budget allocations.

### *I AM NEW global brand marketing campaign*

Through this campaign, eight international students worked alongside Māori fashion designer Kiri Nathan to collaborate on designing a new type of education garment that embodies the cultural values that make a New Zealand education unique: manaakitanga (care of people), kaitiakitanga (care of place), and the pōtiki spirit of youthful energy and finding a better way. The narratives in the campaign focus on the students' experiences and goals, and explore themes such as work and career readiness, sustainability, and innovation through collaboration.

The campaign targets tertiary and Year Nine and above school students, and their parents, in 10 key markets. The campaign was launched at NAFSA and runs across Facebook, Instagram, Google, TikTok, YouTube, and other media.

I AM NEW is a video-led campaign with the following updates as of 30 July 2022:

- visits to Study with New Zealand: 737,258
- new users to Study with New Zealand: 594,177
- more than 6,337 sign-ups to ENZ's marketing database the Study with New Zealand website during the campaign period
- I AM NEW campaign landing page active visits: 617,799
- paid media (ex-China) reach: 96.9 million (this includes duplicates across platforms)
- paid media (ex-China) engagements: 10.7 million.

The campaign began in China 16 June and is running across We Chat, Weibo, Bilibili, Baidu and several KOL's (Chinese influencers):

- paid media (China) reach: 29.2 million
- paid media (China) engagements: 538,259
- The People's Daily Overseas Edition, one of China's state-owned media, conducted an exclusive feature with Wang Hanbo. The feature has been reposted by a large number of China's core state-owned media, with more than 15,800,000 views across all of the articles related to the feature.

### *Prime Minister's visit to Japan and Singapore*

ENZ's Chief Executive was part of the delegation of officials who travelled with Prime Minister Ardern and Minister for Trade and Export Growth, Damien O'Connor, to Japan and Singapore during the quarter.

During the visit, ENZ and Japan Women's University signed an Education Cooperation Arrangement (ECA) on 22 April, witnessed by the Prime Minister. The partnership establishes a framework to

enhance cooperation and to provide more opportunities for students from Japan Women's University and its four affiliated schools to study in New Zealand and promote two-way student and faculty mobility.

Prime Minister Ardern, alongside the President of Fonterra Japan, Mr Yasuhiro Saito, and Commissioner from Japan Sports Agency, Mr Koji Murofushi, also relaunched the Game On English programme that started in 2014. The 2022 phase of Game On English will see female rugby players travel to Hamilton to study English and receive high-performance rugby training, sponsored by Fonterra, around the time New Zealand hosts the Women's Rugby World Cup 2021 (being held in 2022).

Prime Minister Ardern also met with four Japanese students who had studied in New Zealand while on a Working Holiday Visa (WHV) during a "Meet and Greet" MFAT-organised event to promote the Working Holiday Scheme in front of Japanese media and prospective Working Holiday Visa applicants.

The events showcased the three strongest sectors for Japan – English language, secondary schools and tertiary – and reaffirmed that the New Zealand border is open to welcome the Japanese students back. As Japan and New Zealand celebrate 70 years of diplomatic relations, the Prime Minister's engagement, along with her meeting her homestay sister from 30 years ago, highlighted the people to people ties between the two countries and the importance of education linkages supporting the wider bilateral relations objectives.

#### *Your travel to the United States and Latin America*

Your visit to Denver, United States (US), São Paulo, Brazil, and Santiago, Chile, from 29 May to 6 June 2022 successfully highlighted that New Zealand is reconnecting with the world, increased the visibility of New Zealand's education offering, strengthened bilateral and system connections, and boosted the visibility of New Zealand as a preferred destination for international students in the US, Brazil and Chile.

During the visit, you highlighted New Zealand's unique, high-value education offering, met with counterparts to support bilateral relationships, and connected with alumni networks and New Zealanders based offshore. It was also clear for offshore partners that New Zealand values the depth of the education relationship in each country, and your interest in developing these relationships.

There was a significant media coverage following the visit, and some of the key takeaways were the emphasis on diversity, equity, and inclusion, indigenous-led international education engagement, and internationalisation. The trip strengthened New Zealand connections with the international education community. It is now well aware that we are ready to host students and can provide a unique and high-quality education experience.

Since your visit, you have highlighted diversity, equity and inclusion, education agent engagement and alumni engagement as being key to the future of bilateral education relationships in the region. ENZ will ensure these themes continue to be an integral part in future initiatives to improve educational outcomes, establish partnerships and grow global connections.

ENZ and MoE continue to work on an action plan that tracks specific outcomes and actions from your visit. Exploring future engagement opportunities and follow-up on several activities are already under way.



## Pono

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

### Supporting the sector

We focused on supporting the sector to develop diversified products and services that could be tested via a series of pilot schemes, and then worked with them – and other, less traditional providers and organisations – to develop business cases to access the Product Innovation Fund.

### Diversifying products and services

#### *Product Innovation Fund update*

ENZ received 151 Expressions of Interest and 58 applications for the fund. Of these, 18 applications were shortlisted and six were successful, with 1 further application pending consideration and approval by ENZ Board in August. In addition, three recipients were selected from an earlier pilot. ENZ announced the recipients in August.

The application and assessment process were co-designed by ENZ and Creative HQ. Feedback from participants and external advisors was that the process represented best practice for distribution of innovation funding.

#### *Rented Online Education Platform Pilot*

The primary focus for this workstream during the quarter was engaging with education providers to maximise sector participation in the second pilot, and then planning and building the promotional campaigns to support it.

The second FutureLearn pilot went live on 4 July with 28 providers. This represented a significant increase from the 11 providers who participated in the first Pilot with FutureLearn in 2021, indicating a growing desire to explore online education opportunities, and an acknowledgement of the value of participating in a collective initiative led by ENZ.

Throughout the quarter, participating providers developed and published course content for the FutureLearn platform. By 30 June, the anticipated number of courses on offer increased from 20+ courses (during Pilot #1) to 70+ courses by completion of Pilot #2. FutureLearn indicated to ENZ that this number of providers and courses had surpassed the equivalent participation numbers for the Austrade equivalent campaign on FutureLearn.com.

As of 22 July, there had already been success in generating paid enrolments and we anticipate achieving the target of 4,000 paid enrolments by the end of the 12-week promotional campaign.

#### [New Zealand Owned and Branded Online Education Platform](#)

ENZ and NZQA prepared and submitted a paper to the International Education Chief Executive's group in April seeking approval to access the \$1.3m in funding designated for a New Zealand Owned On-Line Education Platform for the 2022/23 year from the Covid Response and Recovery Fund. Following approval by the Group, a funding specialist Project Manager has begun developing a high-level project plan and scoping a co-design process with the sector.

#### [Tech Week 2022](#)

New Zealand's technology and innovation sector is growing rapidly and TechWeek supports that growth through creating a week-long opportunity for fostering connections and collaborations. There were 417 virtual and in-person events attended by more than 20,000 people throughout New Zealand across the six days of the event.

ENZ worked with Amazon Web Services to host a webinar to support the EdTech Start-up community to accelerate their export growth. ENZ also chaired an EdTechNZ panel between students, educators, MOE, education technology companies and academics to explore digital citizenship, how parties can collaborate to navigate what is an evolving and often difficult digital environment for tamariki, rangatahi and everyone connected to them. Discussion included digital citizenship as an evolving concept and the different ways that digital technology affects the lives and life chances of tamariki (children) and rangatahi (young people). There was consensus across the panel that government and the private sector could focus more on keeping up with the pace of change in order to better protect children and young people from new risks and harm.

#### [Hono](#)

---

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

#### [Global citizens](#)

Our focus during quarter four was relaunching and running the Prime Minister's Scholarships for Asia and Latin America (PMSA/LA). The recipients of this first recommended round were announced on 12 July 2022. Another significant achievement was the finalising of an arrangement with the Ministry of Foreign Affairs and Trade (MFAT) around the operational management of the Manaaki New Zealand Scholarship Programme (MNZSP).

#### [Relaunch of the Prime Minister's Scholarships for Asia and Latin America](#)

The selection panels for the PMSA/LA group round that closed in April 2022 took place over 15 and 16 June 2022. Both the PMSA and PMSLA were oversubscribed with a total request of \$8.7m for the \$3.75m available. You announced the recipients of the group scholarships on 12 July 2022, and groups will undertake travel within the 2022/23 financial year.

#### [Prime Minister's Scholarships for Asia](#)

From 32 applications, 21 were accepted. The PMSA will support 270 recipients travelling to China, India, Indonesia, South Korea, Taiwan, Thailand and Viet Nam. These recipients will undertake a variety of programmes, including a number focused on indigenous connections [ENZ 2122-147 refers].

#### [Prime Minister's Scholarships for Latin America](#)

Of the 10 group applications, 9 were approved. These will support 117 recipients travel to Brazil, Chile, Colombia and Mexico. Successful groups included Te Pūkenga 4-week Summer Programme at University of Santo Tomas in Chile and a Massey University 4-week Performance Arts Culture and Language Exchange to Universidad de los Andes, Colombia [ENZ 2122-147 refers].

#### [Manaaki New Zealand Scholarships Programme \(MNZSP\) Partnership with MFAT](#)

On 5 July 2022 ENZ and MFAT formalised the partnership for ENZ to deliver the MNZSP, with the signing of the Partnership Arrangement and Partnership Agreement. This followed several months of work to ensure a smooth transition plan, and ENZ will take over operations for the MNZSP from November 2022, with detailed planning now underway. The partnership will see MFAT retain strategic direction setting and alumni management, with ENZ taking over responsibility for operational management of the MNZSP.

#### [Te Kura Māori o Porirua and Japanese schools connect through Code Camp](#)

Students from Te Kura Māori o Porirua and ENZ's ECA Partner Waseda University High School learned basics on how to code at [code camp](#) on 15 May, and were introduced to each other's country and culture during an event on 19 May [ENZ 2122-140 refers]. Code Avengers, a global ed-tech company based in New Zealand facilitated the events, which took place both in person and virtually. The event aimed at raising awareness of New Zealand's digital education resources and how these skills prepare students for the future.

The Japanese winning team created a website on United Nations (UN) Sustainable Development Goal (SDG) 10 – Reduce Inequality, and the winning New Zealand team presented on UN SDG 14 – Life Below Water, complete with a swirling blue background design on their website.

The participation of Kura-ā-Iwi supported the deepening of existing indigenous cultural connections. The initiative builds on the agreement signed in November 2020 between the Hokkaido Board of Education and ENZ with a strong indigenous focus. ENZ also works with education partners, including Waseda University, North Asia Centre of Asia-Pacific Excellence (NA CAPE) and Code Avengers to build long lasting connections and develop Global Citizens.

## Kono

---

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

### Refreshed NZIES

ENZ has worked closely with the sector and within government on the MoE-led refresh of the NZIES.

MoE ran a public consultation on the refreshed strategy, and ENZ supported eight workshops with the sector and international students to build a clear picture of their priorities and how they want government agencies to deliver on the Strategy's goals. You launched the refreshed NZIES at the New Zealand International Education Conference in August.

### Supporting decision making across government

Within government, we have provided advice about priority countries, as well as some of the key challenges for the sector in rebuilding its capability and capacity. During the quarter ENZ contributed to, and supported, decision making across government relating to international education.

#### *The International Education Chief Executives Group*

The International Education Chief Executives (CEs) met twice during the quarter: 20 April and 17 June. Among other matters, the group considered future recruitment options to support the rebuild of the sector, and updates and outcomes of Cabinet decisions regarding the refresh of the New Zealand International Education Strategy and the Immigration Rebalance. The Productivity Commission's Chair presented on the Commission's report on immigration settings.

The group endorsed a review of its role and purpose into the future, given that it was originally established in response to the sector's COVID-19 recovery response. With the rebuild of the international education sector underway, the CEs agree there is value in retaining the group and endorsed its continuation with a refreshed purpose. The International Education General Managers' group is currently working on this refresh which will be considered by the CEs in the first quarter of the 2022/23 year.

### ENZ's Fit for Purpose changes to support government and sector priorities

As part of our "Fit for Purpose" re-organisation we made 14 appointments during the quarter with a mixture of internal and external candidates. We have seen a high calibre of applicants for our roles. We were very pleased to be able to recruit two advisors to support our Rautaki Māori and have made an appointment to the role of General Manager Sector Engagement.

We have also made two internal and one external appointment into our new Operations Management team.

Unplanned turnover to the year ended 30 June was 17.39%, being double that of 12 months earlier, but still significantly less than other agencies. Some of this turnover was the result of opportunities arising in a tight labour market. This was in the context of ENZ having taken a measured approach to remuneration reviews for the 2021/22 year.

## Risks and Issues Management

---

This section describes ENZ's monitoring and reporting mechanism for managing risks and issues to maintain oversight and provide assurance over the initiatives of ENZ's Business Plan 2021/22.

To maintain high level oversight over ENZ's strategic objectives and manage risks and issues effectively, ENZ's strategic issues and key risks are regularly reviewed by the Audit and Risk Committee which provides independent assurance related to ENZ's strategic risks. ENZ's senior leadership team also undertakes monthly reviews of strategic risks to ensure the mitigation plans are in place, managed and effective.

ENZ has used the recently revised risk management policy and new risk management procedure to communicate and raise awareness to better support decision-making, to help us to proactively manage risk, and to minimise any potential negative consequences. As part of business planning for 2022/23, the Audit and Risk Committee and the Board considered the strategic issues and risks in the current operating environment. The Board also agreed to maintain biannual risk discussions as part of its 2022/23 programme, with continued regular reporting using a newly developed risk reporting dashboard.

We will brief you on substantial shifts in ENZ's strategic risks, and we will continue to discuss these with our monitoring agencies and other agencies, as appropriate.

Proactive Release



## Financial performance to 30 June 2022

STATEMENT OF FINANCIAL PERFORMANCE	For the 12 months to 30 June		
\$000s	Actual 2021/22	Budget 2021/22	Actual 2020/21
<b>Operating Revenue</b>			
Revenue from the Crown - Operating	34,398	34,248	29,428
Revenue from the Crown - EEL	3,266	3,266	3,266
Other revenue	303	68	321
<b>Total operating revenue</b>	<b>37,967</b>	<b>37,582</b>	<b>33,015</b>
<b>Scholarship Revenue</b>			
Revenue from the Crown - scholarships	3,750	3,750	127
<b>Total scholarship revenue</b>	<b>3,750</b>	<b>3,750</b>	<b>127</b>
<b>Operating Expenditure</b>			
Personnel costs	14,576	13,153	13,509
Other expenses	23,078	24,192	19,216
Depreciation & amortisation expenses	211	237	253
<b>Total operating expenditure</b>	<b>37,865</b>	<b>37,582</b>	<b>32,978</b>
<b>Scholarship expenditure</b>			
Scholarship expenses	3,753	,3,750	178
<b>Total scholarship expenditure</b>	<b>3,753</b>	<b>,3,750</b>	<b>178</b>
<b>Net surplus / (deficit)</b>	<b>99</b>	<b>-</b>	<b>(14)</b>
STATEMENT OF FINANCIAL POSITION	As at 30 June		
\$000s	Actual 2021/22	Budget 2021/22	Actual 2020/21
<b>Assets</b>			
Total current assets	11,900	5,680	7,004
Total non-current assets	312	182	354
<b>Total assets</b>	<b>12,212</b>	<b>5,862</b>	<b>7,358</b>
<b>Liabilities</b>			
Total current liabilities	9,105	3,050	4,266
Total non-current liabilities	209		294
<b>Total liabilities</b>	<b>9,314</b>	<b>3,050</b>	<b>4,560</b>
<b>Net assets</b>	<b>2,898</b>	<b>2,812</b>	<b>2,798</b>
STATEMENT OF CASH FLOW	For the 12 months to 30 June		
\$000s	Actual 2021/22	Budget 021/22	Actual 2020/21
<b>Cash flows from operating activities</b>			
Receipts from the Crown	41,414	41,264	32,821
Receipts from Other revenue	183	-	319
Payments to suppliers, employees and IRD	(35,806)	(41,095)	(34,890)
<b>Net cash flow from operating activities</b>	<b>5,791</b>	<b>170</b>	<b>(1,750)</b>
<b>Cash flow from investing activities</b>	<b>(576)</b>	<b>(23)</b>	<b>536</b>

Net increase/(decrease) in cash	5,215	147	(1,214)
Cash at the beginning of the year	914	683	2,128
<b>Cash at the end of the year</b>	<b>6,129</b>	<b>830</b>	<b>914</b>

ENZ has met its full year expenditure target, recording a minor surplus of just under \$0.1m on \$41.6m of forecast expenditure and with a closing equity of \$2.8m.

COVID-19 Response & Recovery (CRRF) funding was utilised across:

- I AM NEW (Graduation GARB) campaign, which is leveraged at NAFSA and ICEE global events and supported by SWNZ digital services.
- The product innovation fund to the sector, and funding was allocated to successful applicants in June. Engagement and further funding will continue in the new financial year.
- The pathways (offshore delivery) project was almost completed to plan, however, we had an underspend of \$0.3m as we announced a global pause to reassess the programme whilst additional advice was sought on some of the Education centre opportunities.

Seed funding investment across the regions for selected projects across social licence, student experience and long-term retention was delivered in June.

In-market agent co-investment was delivered, and new digital development activity funded in June.

Proactive Release

## ENZ's Impact, Performance and Organisational measures

### Impact measures

	2020/21 Full Year Result	Target 2021/22	2021/22 Full year Result	Status <sup>1</sup>	Comment as of 30 June 2022
International student perceptions of education quality.	7.7 out of 10	2021: 8.2 out of 10	7.7 out of 10	Not achieved	Given only a small number of students have been able to study with New Zealand the past two years due to the borders being closed, maintaining perceptions of New Zealand's education quality during this period is an excellent outcome.
The percentage of international students who were satisfied or very satisfied with their overall experience.	85%	2021: Increase	Not measured		This survey was not undertaken in a comparable manner to the 2020/21 year. Please refer to information earlier in this report for further detail in relation to the International Student Experience Survey.
The economic value from New Zealand's international education sector.	\$3.03b	2021: Maintain	Not yet finalised		These results will be finalised when ENZ has finished processing 2021 enrolment data. We expect to provide the results in our Annual Report 2021/22. ENZ has commissioned a Broader Impact Valuation.
The economic value per international student.	\$37,889	2021: Increase	Not yet finalised		
The percentage of international students enrolled to study outside Auckland.	50.1%	2021: Increase	Not yet finalised		
The percentage of the international education sector's economic value coming from New Zealand's top two markets.	53%	2021: Decrease	Not yet finalised		
Awareness of the contribution of international education to New Zealand.	The survey was redeveloped in 2020/21.	2021/22: Increase	59%	Achieved	

### Performance measures

	2020/21 Full Year Result	Target 2021/22	2021/22 Full Year Result	2021/22 status	Comment (as of 30 June 2022)
Supporting the rebuild of the international education sector by leading the implementation of the government's Strategic Recovery Plan's 'Transforming to a more sustainable future state' workstream, with: An increase in onshore international student numbers <sup>3</sup>		New measure in 2021/22	-42.9%		These results are based on 2021 international student enrolment numbers that have not yet been officially released by the Ministry of Education. Final results are expected to be provided in the Annual Report 2021/22.
Increased ENZ engagement and collaboration with providers and businesses to support a diversified international education sector <sup>4</sup>		New measure in 2021/22	76.15%		ENZ developed questions to enable baseline collection of this measure. These were added into the facilitated customers industry survey <sup>5</sup> .

<sup>1</sup> **Key:** ✓ Achieved ✗ Not Achieved NA Result is not yet available, but will be included in the *Annual Report 2021/22*

<sup>2</sup> ENZ ran an online survey of a representative sample (by age, gender & region) of adult New Zealanders in June 2022. 1034 responses were received. Measure based on those that responded agree or strongly agree to the question: "Overall, to what extent do you agree or disagree that international education/international students benefit New Zealand?"

<sup>3</sup> This is a new measure, intended to measure the "early return of students" activity set out in the Recovery Plan. This is focused on the return of students when it is safe to do so as an important part of the sector's recovery. The 2020 international student enrolment numbers will be used as a baseline. Onshore international students are non-residents of New Zealand and have expressly entered New Zealand with the intention of study. This includes international PhD students, exchange students, NZ Aid students, foreign research post-graduate students and full fee-paying international students who have entered New Zealand.

<sup>4</sup> This is a new measure, intended to reflect ENZ's role in leading the 'Transforming to a more sustainable future state' workstream as set out in the Recovery Plan. ENZ works with the sector to support a diversified international education sector. ENZ plans to survey the New Zealand international education sector to establish the baseline for improved engagement and collaboration. This measure reflects the longer term/multi-year nature of the sector's recovery from the COVID-19 pandemic.

<sup>5</sup> Weighted average scores for four questions were calculated and added together to provide the baseline measure (where strongly disagree =1; disagree =2; neutral =3; agree =4; strongly agree =5). The four questions used are:

I am satisfied with the quality of engagement ENZ provides my organisation  
 I am satisfied with the frequency of engagement my organisation has with ENZ  
 Collaboration with ENZ adds value to my organisation  
 ENZ provides support to diversify the international education sector

	2020/21 Full Year Result	Target 2021/22	2021/22 Full Year Result	2021/22 status	Comment (as of 30 June 2022)
Facilitate engagement and collaboration via the Chief Executive's Group to ensure greater alignment across government agencies to support the implementation of the Recovery Plan <sup>6</sup>		New measure in 2021/22	4 annual engagements	Achieved	For quarter four, CEs' meetings were held in April 2022 and June 2022.
Number of students studying towards a New Zealand qualification through ENZ's offshore study partners or partner qualifications. <sup>7</sup>		New measure in 2021/22			Information from the provider will be available in September and will be reported in the Annual Report 2021/22.
Percentage of facilitated customers that agree ENZ's services and support have added value to their organisation. <sup>8</sup>	75%	≥ 75%	82%	Achieved	Result from Industry survey which had a 46% response rate.
Percentage of users satisfied with the information and intelligence provided by ENZ.	74%	≥ 87% of users rate it as good or higher	83%	Not achieved	Although the target was not met, the result is an improvement on the previous year. <sup>9</sup>
Percentage of Active Visits on ENZ's studyinnewzealand.govt.nz website. <sup>10</sup>	78%	≥ 75%	78%	Achieved	This is data up to 7 December 2021 when the Study in New Zealand website was decommissioned.
Percentage of Active Visits on ENZ's studywithnewzealand.govt.nz website. <sup>11</sup>		≥ 75%	62%	Not achieved	This is data from 7 December 2021 when the Study with New Zealand website was commissioned to replace the Study in New Zealand. Due to it being a new website, our ability to drive active visits to the site via search marketing was impacted. This result also reflects that ENZ was not undertaking active 'promote' marketing activity for most of the financial year.
Number of registrations to ENZ's Student Membership Programme through studyinnewzealand.govt.nz website.	49,435	55-70,000	34,665	Not achieved	Following the change from the Study In New Zealand website to the Study With New Zealand website, ENZ ceased recording this information as of 7 December 2021.
Number of registrations to NauMai NZ. <sup>12</sup>	3,939	2,000	884	Not achieved	Efforts to maintain the visibility and value of NauMai NZ, throughout the pandemic, have contributed to the ongoing growth of the NauMai NZ database. Growth has been limited in the financial year given the reduced numbers of students in New Zealand. Engagement (active visitors) with the site continues to be high.
Number of key messages about the benefits to New Zealand from international education delivered by third parties.	133	100			The data for 2021/22 is not comparable with data from previous years.

<sup>6</sup> This is a new measure intended to reflect ENZ's role in supporting the implementation of the Recovery Plan and the expected impacts of the Recovery Plan. ENZ's work with managing the Chief Executives' Group will contribute to the New Zealand education sector rebuild and reset longer-term. This measure reflects the longer term/multi-year nature of the sector's recovery from the COVID-19 pandemic.

<sup>7</sup> This new measure reflects the NCUK-Universities New Zealand-ENZ partnership that will allow students to begin a New Zealand university qualification without leaving home. This initiative supports the 'Transforming to a more sustainable future state' workstream of the Recovery plan by building the sector's transnational education capability and providing greater resilience to future student mobility impacts.

<sup>8</sup> 'Facilitated customers' are large education providers, peak bodies, and regional partners that ENZ business development managers work actively with to provide growth-focused services and targeted support.

<sup>9</sup> This was collected as part of the facilitated customers industry survey. Respondents that had used ENZ's intellilab service in the past 12 months and rated it as important or very important to their organisation. This year we also gave non-facilitated customers the same question. Across all respondents that had used intellilab 83% rated it as important or very important. We also asked a question "to what extent do you agree or disagree that the information and intelligence provided by ENZ is useful for my organisation's decision making. 73% of facilitated customers agreed or strongly agreed to this and 52% of all respondents agreed or strongly agreed.

<sup>10</sup> 'Active visits' are defined as those where the visitor engages with the website content, e.g., clicking links, scrolling, and viewing multiple pages or video. It is considered a measure of both the quality of the traffic to the website and the quality of the content on the website.

<sup>11</sup> 'Active visits' are defined as those where the visitor engages with the website content, e.g., clicking links, scrolling, and viewing multiple pages or video. It is considered a measure of both the quality of the traffic to the website and the quality of the content on the website.

<sup>12</sup> ENZ's NauMai NZ the official government digital platform tailored for an international student audience to provide clear, timely information for international students. The reduced target is based on the current trend of running at 6% of the year target of the student population and border closures. ENZ will continue to invest into social promotions across all our platforms to promote the content on ENZ's student experience platform and drive this growth, to encourage registrations to NauMai NZ.