

**THINK  
NEW<sup>®</sup>**



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**Education New Zealand Quarterly Report**

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1 January – 31 March 2023



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PROACTIVE RELEASE

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## Executive summary

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New Zealand's international education sector is making a steady but uneven recovery. The uneven nature is particularly noticeable across sub-sectors, with the university sector experiencing a stronger recovery than other sectors.

Providers are reconnecting with markets, taking New Zealand's education offering to the world and focusing on rebuilding relationships and partnerships that will deliver mutual benefits. Within New Zealand, the sector continues to face challenges with capacity and capability, which we are supporting providers to address.

As of 31 March 2023, there were 31,941 valid student visas for New Zealand, compared to 12,791 at the same point in 2022. The 2022 number was the low point of valid student visa numbers. We expect the number of international students seeking to return or travel to New Zealand to continue to rise.

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

In quarter three, our focus was on:

- Tono – Reconnecting the sector in market and in person
- Pono – Working with the sector to support diversification of products and services
- Hono – Strengthening global connections through scholarships and indigenous education opportunities.

We launched a New Zealand-owned platform to deliver education products and services offshore, fulfilling a key objective of the Diversification of International Education Products and Services programme of work. We are developing our recommendations for the report back on this programme, which will be delivered in September 2023, and engaging with partner agencies to ensure our recommendations are aligned with the NZIES and government priorities.

We continued to embed our Rautaki Māori into our operations, with a strong focus on building indigenous education opportunities for both New Zealand learners and education providers through creating linkages and relationships. We are integrating the Ministry of Foreign Affairs and Trade's (MFAT) Manaaki New Zealand Scholarship Programme (MNZSP) into ENZ's organisational structure and have continued working with the Ministry of Education to build a clearer picture of our investment profile. We also focused on the development of our new Statement of Intent 2023-2027, aligning with the NZIES outcomes where ENZ has a key role.

ENZ continues to focus on workforce-related issues related to pay equity and staff wellbeing. We have achieved gender pay equity in roles within the same pay bands. We continue to address the gender pay gap (ie the gap between average remuneration paid to all males vs all females across the organisation). Staff wellbeing continues to be monitored using an array of measures including sick and special (Covid) leave usage, annual leave accrual, EAP usage, unplanned turnover levels (the latter is currently 8%). Cumulatively, these measures do not present a concern about staff wellbeing.

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## International education operating context

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International education continues to rebound globally. While traditional competitor countries are focused on student recruitment, we are seeing them offer a wide range of incentives on one hand whilst tightening visa settings on the other. For example, Australia has recently signalled a tightening

of international student visa conditions, and a higher income threshold when shifting to post-study work visas converging the Australian policy with NZ's immigration rebalance policy. While safety continues to be a concern for prospective international students, the desire to resume international travel and face-to-face study is driving strong growth.

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## Work completed in quarter three

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### Tono

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

The work in this quarter focused on:

- supporting the sector to access key markets, build relationships, and tell the story of what New Zealand and New Zealand providers have to offer
- undertaking and supporting in-person activities in market

We delivered activities in line with the following strategic initiatives:

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

#### **Ministerial travel: United States, Canada**

As you know, ENZ supported the coordination of international education events as part of your attendance at the ISTP Conference in Washington D.C. and Canada in April. We will report on outcomes from this visit through our regular reporting.

#### **Official travel by Minister Mahuta: India, Japan, Singapore**

ENZ worked with the Ministry of Education (MoE) and the Ministry of Foreign Affairs and Trade (MFAT) to support the travel by Minister Mahuta to India in February, and to Japan and Singapore in March.

In India, Minister Mahuta visited a group of Prime Minister Scholarships for Asia (PMSA) recipients undertaking their 6-week placement at the Global Career Centre in Mumbai. As part of this programme, students completed internship roles in a wide range of areas including, social services agency development, education & public health, marketing and communications and social justice.

As part of her visit to Japan, Minister Mahuta launched ENZ's new (Japanese language) Study Sustainability in New Zealand webpage. The page promotes a range of sustainability-focused study programmes to a Japanese audience [2223-140 refers].

#### **World Digital Education Conference: Beijing**

After several postponements, the World Digital Education Conference took place in February in Beijing. Our participation raised New Zealand's visibility at a very high-level government event and reinforced our positive relationship with leaders and the China Ministry of Education. New Zealand featured prominently, and officials were able to briefly engage with Chinese leaders responsible for education.

#### **Asia Pacific Association of International Education (APAIE) 13-16 March 2023, Bangkok**

In March, New Zealand hosted a pavilion at APAIE. APAIE is a promotional and networking opportunity for universities, Te Pūkenga and PTEs as it is a key gathering and meeting place for international educators and government agencies from around the world. The conference also raised brand awareness of New Zealand international education.

The theme of this year's conference was 'Towards a sustainable future for international education in the Asia Pacific'. All eight universities and Whitecliffe College, a tertiary provider, attended APAIE 2023. ENZ's Director of Scholarships presented on the theme of Global Citizenship.

Debuting in 2006 with 400 delegates, APAIE now attracts more than 2,500 delegates. The growing attendance each year at the conference reflects the burgeoning interest in the region and recognition of the Asia Pacific's important role in international education.

APAIE is one of the three global events that ENZ attends. Global events offer an efficient and sustainable platform for the sector to maintain relationships with existing institutional partners and to develop relationships with suitable new institutional partners. It also offers a platform for ENZ to engage with the University sector and with government and agency partners.

Along with the sector, ENZ colleagues attending APAIE, including Grant McPherson (Chief Executive), Wendy Kerr (GM Sector Engagement), Ben Burrowes (Regional Director Asia) & Chortip Pramoolpol (Market Manager) attended meetings with the Thai Ministry of Higher Education Science, Research and Innovation (MHESI), the Office of Civil Service Commission, the Ministry of Education and the Thailand National Innovation Agency to develop a better understanding of MHESI's priorities in 2023 and discuss areas of collaboration.

### **Overview of marketing activities**

In the January to April period, we continued to promote the I AM NEW campaign to generate brand awareness in our key markets. The media placements included the Google marketing platform (dv360), Meta (Facebook/Instagram), YouTube and paid search. The call to action is to visit [www.studywithnewzealand.govt.nz](http://www.studywithnewzealand.govt.nz) to learn more about New Zealand as an international education destination.

Active visits to [www.studywithnewzealand.govt.nz](http://www.studywithnewzealand.govt.nz) tracked at 70% of visitors. 'Active visits' are defined as those where the visitor engages with the website content. It is considered a measure of both the quality of the traffic to the website and the quality of the content on the website.

### **Facilitate partnerships, events & other initiatives in target markets**

#### **University of Otago signed a Memorandum of Understanding (MoU) with Thai consortium of universities and high schools**

ENZ facilitated a MoU between the Rajamangala University of Technology and the University of Otago. Rajamangala University of Technology, much like Te Pūkenga, is a consortium of nine universities and 12 high schools delivering undergraduate and graduate levels of education.

The MoU builds on the development of the University of Otago Foundation and Language Centre programme, which allows students to study one semester in Thailand and then a second semester at the University of Otago. Students then have the opportunity to pathway to bachelors' degrees at one of New Zealand's eight universities.

#### **Thai-New Zealand Study Centre (TNZC)**

The TNZC is a partnership between the Thanyaburi campus of Rajamangala University of Technology, AUT and the University of Otago. The partnership provides credit recognition for studies completed at Rajamangala University of Technology Thanyaburi to be transferred to a degree programme with AUT or the University of Otago, after a semester or year of study at the TNZC.

ENZ, together with several education agents who are part of the Education New Zealand Registered Agent programme, promoted the summer study programme at the TNZC in Bangkok in February. More than 400 students and parents attended the event. The feedback from parents and students was very positive with messaging focused on New Zealand being a safe country with a world-class education system. The New Zealand Ambassador delivered the opening remarks.



### ***Perusahaan Listrik Negara (PLN) officials looking to upskill in New Zealand***

PLN is the Indonesian State Electricity Company. It is currently selecting officials to complete postgraduate studies offshore through its 'study on mission programme' to achieve Net Zero Emissions in Indonesia. PLN plans to sponsor officials to study via three scholarship schemes beginning in 2024:

- Lembaga Pengelola Dana Pendidikan (LPDP) scholarships. LPDP is a public service agency under the Ministry of Finance with agreement by the Ministry of Education, Culture, Research, and Technology
- Manaaki Scholarships (where officials meet eligibility criteria)
- funded by PLN (case by case).

ENZ organised an information session between the University of Auckland, University of Otago and PLN, at the request of PLN. Since the information session, PLN have confirmed that 13 officials will be applying to study at the University of Auckland. PLN and the University of Auckland are also in the process of developing an MoU to support this partnership and the flow of students going forward.

### ***New Zealand education providers selected as International Indonesian Student Mobility Awards (IISMA) partners***

The University of Auckland, University of Otago, University of Canterbury, Victoria University of Wellington, and Nelson-Marlborough Institute of Technology have been selected by IISMA as host institutions for the 2023 IISMA programme.

IISMA is a scholarship programme administered by the Indonesian Ministry of Education, Culture, Research and Technology which funds Indonesian students for a one semester-mobility programme at top universities and reputable industries overseas. There are two schemes; one for undergraduates and one for vocational students. IISMA aims to expose Indonesian students to international academic and cultural diversity. ENZ was a key part of connecting the New Zealand providers with the IISMA team at the Ministry of Education, Culture, Research and Technology to support New Zealand being part of the programme.

### ***New Zealand Schools Scholarship (NZSS) in Viet Nam***

ENZ worked with SIEBA to relaunch the [NZSS](#) – a key market initiative for the school sector in Viet Nam. This year, 45 New Zealand high schools partnered with ENZ to support Vietnamese students by offering a 50% tuition fee discount for the first year of study. The initiative targets high value Vietnamese students, many of whom pathway through three or more years of schooling into New Zealand universities. A number of events took place through February and March, and applications closed on 5 April. There were 28 fully completed applications made (15 with support from education agents and 13 independent applications), of which five were ineligible for the programme or withdrew. The remaining 23 applications were for 14 of the eligible New Zealand schools. The applications are being considered at present. We will report the outcomes to you in due course.

## **Support the sector with accurate and timely intelligence**

### ***International Education Peak Body Forum***

ENZ hosted an International Education Peak Body Forum in March.

Attendees included peak body representatives, Immigration New Zealand (INZ), Ministry of Business, Innovation and Employment (MBIE), MoE and New Zealand Qualifications Authority.

The meeting included a round table update from the peak bodies with some common themes:

- enrolments are generally as expected although recovery is inconsistent in some sectors (e.g.; schools)
- staffing and resourcing to rebuild the pipeline is an ongoing issue
- immigration changes appear to have influenced a growth in enrolments at level seven and above

- a request to Government to help not divert providers from student recruitment with compliance-related tasks.
- there is a desire to open new markets and reduce the reliance on China. This requires developments such as the management of financial evidence requirements
- there are opportunities to pathway students between providers to higher level study
- there is a general need to keep up with competitor country settings to keep New Zealand attractive.

### **Capability building initiatives for the school sector**

An online and in-person year-long programme for school international department heads who have started in the past year began on 27 February. It is called *Running Start: A Development Programme for New International Department Leaders*. The programme has been partially funded by ENZ and is organised and run by SIEBA.

The aim of the programme is to create a network of professional support for newly appointed international staff who will meet regularly to get guidance and support. There has been high turnover of international staff in schools since 2020, and there are many new entrants to the industry.

### **China Marketing Insights and Strategies – Regional Sessions**

During a visit to New Zealand, ENZ's China Marketing and Communications Manager delivered marketing insights for Christchurch Educated members, Study Dunedin, and PTE providers in Auckland. Approximately 40 people participated across the three sessions.

As part of our marketing strategy in China, ENZ invited key education media outlets to the Agent Seminar in Beijing on 10 May, to speak directly with New Zealand providers attending the events. The purpose is to offer opportunities for New Zealand institutions from all sectors to communicate and promote themselves to the Chinese media.

## **Pono**

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

The work in this quarter has focused on supporting the sector to diversify the products and services on offer for offshore learners.

## **Complete delivery of the CRRF diversification work programme**

### **Product Innovation Fund**

Te Whare Hukahuka, a recipient of ENZ's Product Innovation Fund, launched its Ka Hao Indigenous e-Commerce programme in February. Thirty participants from Fiji, Papua New Guinea, Samoa and the Solomon Islands received scholarships through the fund. Across 18 weeks learners design, build, launch and grow their own e-commerce system selling products and services to the world. Te Whare Hukahuka will provide insights and learning to ENZ that could be valuable to New Zealand educational providers seeking to teach within the Pacific region.

### **Study with New Zealand online**

To explore the demand for online learning from New Zealand education providers for 35 to 55-year-old mid-career professionals ENZ is piloting a new online platform titled Study with New Zealand Online.

As of the end of April, the platform hosts 46 courses by 17 providers. The platform was launched on 20 March and is being supported by a paid marketing campaign targeting adult professional learners

in the United Kingdom, Australia, Canada, and Germany. Since the beginning of the campaign the platform has attracted more than 60,000 visits and generated 304 course enrolments.

## Student experience

### **Severe weather events**

ENZ participated in cross-agency Emergency Advisory Group meetings regarding Upper North Island flooding and Cyclone Gabrielle.

Communications messages developed through this forum, together with key information from National Emergency Management Agency and Civil Defence, informed ENZ's advice for international students affected by Cyclone Gabrielle and other severe weather events. This included information to support parents or education agents offshore attempting to contact a student in New Zealand. We distributed this advice through ENZ's student-facing channel – NaulMai NZ – and shared it with internationally based teams to support interactions offshore.

### **Student experience resources launched by ISANA New Zealand**

As part of the ENZ Capability Protect Programme, an initiative launched during the COVID-19 pandemic to retain, support and grow capability across the sector, ISANA launched a new website ([www.isana.nz](http://www.isana.nz)) to provide advice and guidance for those who work with international students in New Zealand.

The website and its resources were funded by ENZ. The website includes a range of content to provide professional development opportunities for existing international education practitioners, as well as support and guidance for newcomers to the sector as it rebuilds.

Further content is being developed for the website, including to support practitioners with difficult and sensitive topics relating to international student experience (e.g. sexual health and mental well-being) and to provide systemic training for homestay families, a critical component of the experience for international school students.

## Hono

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

In quarter three, we focused on:

- The Prime Minister's Scholarships for Asia and Latin America
- Embedding the Manaaki New Zealand Scholarship Programme into ENZ
- High level engagement offshore with a strong focus on government-to-government relationships

## Develop and deliver scholarship strategy

### **Prime Minister's Scholarships for Asia and Latin America**

The applications for the Prime Minister's Scholarship to Asia and Latin America group round 2022/2023 opened on 8 March and closed on 23 April. We completed a targeted promotion with marae, iwi, wānanga, Māori departments in education institutions and Māori education providers.

ENZ received 39 applications in total, up from 32 applications received for the 2021/22 group round. There were 27 applications for PMSA and 12 applications for PMSLA. Of those, 13 applications centre around Kaupapa Māori, including 9 applications submitted by Māori-lead organisations.

ENZ is currently undertaking the assessment process of those applications. We will report on the outcomes of the selection panels in the coming months.



### ***Manaaki New Zealand Scholarships Programme (MNZSP)***

ENZ's partnership with MFAT for the operational management of the MNZSP is working effectively. Following the transfer of the programme five months ago, ENZ is supporting providers with more than 460 Manaaki scholars studying towards tertiary qualifications in New Zealand and is preparing to welcome more than 70 new scholars for Semester Two 2023.

Selection is also underway for Tertiary Scholarship students who will study at tertiary institutions in New Zealand and the Pacific in 2024. ENZ received 16,030 applications, just over half the number received in February 2020, the last full application round prior to the COVID-19 pandemic.

In February, as part of the scholarship promotion, ENZ worked with MFAT in Jakarta to coordinate a Manaaki New Zealand Scholarships Virtual Info Session, with MFAT and New Zealand institutions. The session allowed New Zealand education providers to promote their institution and answer questions from prospective Indonesian scholars. More than 400 people took part.

The New Zealand Short Term Training Scholarship (NZSTTS) and English Language Training for Officials (ELTO) programmes have also resumed in New Zealand for 2023, following a 2020-2022 hiatus due to COVID-19. During the quarter, ENZ overseen the successful delivery of:

- **ELTO ASEAN – Intake 55**  
English Language Training for Government Officials, based around a theme of Good Governance. This is the first full in-person intake since 2020 and involved 40 participants from Cambodia, Indonesia, Laos, Timor-Leste and Viet Nam.
- **STTS He Manawa Tītī**  
Created as part of the suite of reparations announced during the New Zealand Government's Dawn Raids Apology for Pasifika peoples in 2021, He Manawa Tītī is a bespoke, one-off training offered for 28 emerging leaders across public, private and civil societies in Fiji, Samoa, Tonga, and Tuvalu. Designed in collaboration with key Pasifika stakeholders and community members, the programme enables young leaders to develop skills in good governance and leadership, supports the kaupapa of the Dawn Raids' reconciliation process, and equips young leaders to work towards positive sustainable development outcomes in their home countries. The scholars arrived in New Zealand on 9 March and will depart on 13 May.

### **Facilitate global connections**

#### ***Engagement with Saudi Arabia and the United Arab Emirates***

ENZ participated in a reopening event at the New Zealand Embassy in Riyadh in February, speaking to an audience of 300 guests about the importance of education links between New Zealand and Saudi Arabia. ENZ, the University of Waikato and the University of Auckland met with Saudi government contacts at the National Institute for Educational Professional Development which is seeking a strategic partner for teacher training, and the Technical and Vocational Training Corporation which is looking to sign a cooperation arrangement with Te Pūkenga.

#### ***Universities New Zealand (UNZ) visit to Southeast Asia***

A UNZ delegation visited Indonesia, Malaysia, Thailand and Viet Nam in March, supported by ENZ. The visit included interactions with host country governments, scholarship providers, institutional partners, and education agent and alumni functions.

In Indonesia, the delegation met with LPDP who are a public service agency which administers full-ride scholarships for Indonesian citizens in postgraduate study. LPDP is seeking to increase the number of scholarships they are awarding for New Zealand.

As a result of the meeting in Jakarta, a senior delegation travelled to New Zealand from 27 – 29 March to gain a better understanding of the study options, facilities, support and services offered at New Zealand universities. The delegation was facilitated throughout its visit by ENZ and showcased the quality of New Zealand’s university system. The LPDP delegation met with all eight universities and confirmed that they will advocate for all eight to be included in their approved institution partner list. A nation-wide Memorandum of Understanding between LPDP and UNZ is now currently being developed to support the flow of students.

In Malaysia, the delegation met with officials from the Malaysian Ministry of Higher Education. The discussion was led by Prof Neil Quigley, Vice-Chancellor at the University of Waikato, and highlighted potential collaborations around digitalisation in Higher Education, research funding, PhD internship programmes, and scholarships.

In Thailand, the delegation met with the Thai Ministry of Higher Education, Science, Research and Innovation, and with the Thailand National Innovation Agency (NIA) to explore collaborations with their innovation and talent development programmes. ENZ and NIA will co-sponsor the Thailand Innovation Awards (TIA) 2023 (a business innovation competition), and will engage a New Zealand innovation expert, Chasing Time English, to provide mentorship for TIA contestants.

ENZ also met with the Thai Ministry of Education in March to reinforce the importance of the bilateral education relationship.

In Viet Nam, UNZ visited Ho Chi Minh City and Ha Noi to meet with local stakeholders. A key meeting was with the Viet Nam Ministry of Education and Training about Project 89, a Vietnamese government scheme to support local lecturers to pursue postgraduate study overseas with fully funded scholarships.

There were also MoU signings with two large education groups in Viet Nam: IGC Group (ENZ’s key school partner) and BHL Education (which owns three local school chains across Viet Nam). This is part of both ENZ and UNZ’s efforts to establish direct recruitment channels to local schools.

## Kono

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

In quarter three, we focused on:

- Embedding our Rautaki Māori in how we work
- High level engagement offshore with a strong focus on government-to-government relationships
- Embedding the NZIES in our future planning

## Rautaki Māori

### **Prime Ministers Scholarship for Asia**

Eight members of Te Pirurutanga mō ngā uri o Puku Papakainga Marae who were recipients of the PMSA, went to Japan during the quarter. The whānau led delegation visited the indigenous Ainu-related organisations and cultural facilities to learn about the Ainu people and deepen cultural exchange between the two countries. Ed Tuari (Manukura – Chief Advisor Māori, ENZ) travelled with the group in Hokkaido representing ENZ.

### **United States National Science Foundation (NSF) visit**

The ENZ Rautaki Māori team hosted a delegation from the U.S. National Science Foundation in New Zealand at the end of February. The NSF is an independent federal agency that supports science and engineering in all 50 states and U.S. territories. NSF fulfils its mission chiefly through making

grants. Their investments account for about 25% of federal support to America's colleges and universities for basic research.

The visit focussed on indigenous research and study in STEM subjects and gave the delegation the opportunity to learn more about Te Ao Māori. The delegation met with Māori researchers and other agencies such as Te Puni Kokiri, Te Taura Whiri and The Royal Society Te Aparangi. The NSF delegation also visited Robinson Institute, a multidisciplinary research institute focussed on engineering, applied physics, and quantum science. The delegation visit continues ENZ's working relationship with the NSF that has developed since late 2019.

### Engagement with other agencies

We worked closely with the MoE on the development of our Statement of Intent for 2023-2027 during the quarter, focusing on delivering the outcomes of the New Zealand International Education Strategy. We have continued our engagement with MoE on the development of our Statement of Performance Expectations 2023/24. Our focus for business planning for 2023/24 has been to ensure alignment with the government's priorities, which is supported through our engagement with other government agencies engaged in international education, such as Immigration New Zealand and MFAT.

The International Education Chief Executive's Group has been superseded by the inclusion of ENZ in the Economic Chief Executives' Forum convened by Treasury and the Ministry of Business, Innovation and Employment. ENZ's Chief Executive participated in this group in April to discuss immigration matters impacting the rebuild of the international education sector.

### Feedback on other agencies' briefing and reports

#### ***Combined international and domestic tertiary student contract dispute resolution scheme***

The MoE consulted on the draft Cabinet paper proposing to combine international and domestic tertiary student contract dispute resolution schemes. Overall, ENZ supported the proposals.

### Risks and Issues Management

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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 Financial performance to 31 March 2023

At the end of the third quarter ENZ's year-to-date surplus of \$4.084m was \$3.254m higher than year-to-date budget of \$0.830m but lower than this time last year. The year-to-date expenditure variance is all timing-related and with one quarter to go we expect to meet our full year forecast of a nil surplus.

STATEMENT OF FINANCIAL PERFORMANCE	For the 9 months to 31 March			Full Year
	Actual 2022/23	Budget 2022/23	Actual 2021/22	Forecast 2022/23
\$000s				
<b>Operating Revenue</b>				
Revenue from the Crown - Operating	23,434	23,435	27,659	31,246
Revenue from the Crown - EEL	-	-	-	-
Other revenue	1,044	112	127	1,030
<b>Total operating revenue</b>	<b>24,478</b>	<b>23,547</b>	<b>27,786</b>	<b>32,276</b>
<b>Scholarship Revenue</b>				
Revenue from the Crown – scholarships*	2,813	2,813	2,813	4,004
<b>Total scholarship revenue</b>	<b>2,813</b>	<b>2,813</b>	<b>2,813</b>	<b>4,004</b>
<b>Operating Expenditure</b>				
Personnel costs	11,341	11,801	10,811	15,459
Other expenses	10,361	12,060	10,327	16,591
Depreciation & amortisation expenses	169	169	154	226
<b>Total operating expenditure</b>	<b>21,871</b>	<b>24,030</b>	<b>21,292</b>	<b>32,276</b>
<b>Scholarship expenditure</b>				
Scholarship expenses*	1,336	1,500	12	4,004
<b>Total scholarship expenditure</b>	<b>1,336</b>	<b>1,500</b>	<b>12</b>	<b>4,004</b>
<b>Net surplus</b>	<b>4,084</b>	<b>830</b>	<b>9,295</b>	<b>-</b>

\* includes Prime Minister's Scholarship \$3.750m and NZ Grads (MPI) \$0.254m.

STATEMENT OF FINANCIAL POSITION	As at 31 March			As at 30 June
	Actual 2022/23	Budget 2022/23	Actual 2021/22	Forecast 2022/23
\$000s				
<b>Assets</b>				
Total current assets	9,629	6,918	14,082	6,053
Total non-current assets	413	87	350	176
<b>Total assets</b>	<b>9,772</b>	<b>7,005</b>	<b>14,432</b>	<b>6,229</b>
<b>Liabilities</b>				
Total current liabilities	2,584	3,050	2,121	3,050
Total non-current liabilities	207	-	217	-
<b>Total liabilities</b>	<b>2,791</b>	<b>3,050</b>	<b>2,338</b>	<b>3,050</b>
<b>Net assets</b>	<b>6,981</b>	<b>3,955</b>	<b>12,094</b>	<b>3,179</b>

STATEMENT OF CASH FLOW	For the 9 months to 31 March		As at 30 June
\$000s	Actual 2022/23	Budget 2022/23	Forecast 2022/23
<b>Cash flows from operating activities</b>			
Receipts from the Crown	26,247	26,248	34,997
Receipts from Other revenue	1,044	112	500
Payments to suppliers, employees and IRD	(23,038)	(25,361)	(41,383)
<b>Net cash flow from operating activities</b>	<b>1,019</b>	<b>999</b>	<b>(5,886)</b>
<b>Cash flow from investing activities</b>	<b>(1,500)</b>	<b>-</b>	<b>478</b>
Net increase/(decrease) in cash	(481)	999	(5,408)
Cash at the beginning of the year	6,129	2,680	6,129
<b>Cash at the end of the quarter</b>	<b>5,648</b>	<b>3,679</b>	<b>721</b>

We are forecasting our cash flow needs to 30 June 2023 and will reinvest as appropriate in April 2023.

Account & Bank	Maturity dates	% pa	% of total	\$m
Call - ANZ	On Call	3.55%	61.74%	5.648
Fixed – ASB	Maturing on 13 June 2023	5.22%	38.26%	3.500
<b>Total Cash at Bank and Term Deposits</b>			<b>100.00%</b>	<b>9.148</b>



## Manaaki NZ Scholarship Programme

### Financial performance to 31 March 2023

The Manaaki New Zealand Scholarship Programme is funded by MFAT and delivered by ENZ.

At the end of the third quarter ENZ was managing a year-to-date deficit of \$0.640m due to accrual of scholarship pass-through costs to providers. MFAT funds ENZ for actual pass-through costs paid to providers during the month. ENZ continues to work closely with MFAT to ensure a nil surplus will be achieved at 30 June.

STATEMENT OF FINANCIAL PERFORMANCE	For the 9 months to 31 March		Full Year
	Actual 2022/23	Budget 2022/23	Forecast 2022/23
\$000s			
<b>Scholarship Revenue</b>			
Revenue from MFAT	15,778	14,438	27,760
Total scholarship revenue	<b>15,778</b>	<b>14,438</b>	<b>27,760</b>
<b>Operating Revenue</b>			
Revenue from MFAT - Operating	1,179	1,980	2,337
Total operating revenue	<b>1,179</b>	<b>1,980</b>	<b>2,337</b>
<b>Scholarship expenditure</b>			
Scholarship expenses	16,324	14,438	27,760
Total scholarship expenditure	<b>16,324</b>	<b>14,438</b>	<b>27,760</b>
<b>Operating Expenditure</b>			
Personnel costs	903	1,230	1,580
Other expenses	370	750	757
Total operating expenditure	<b>1,273</b>	<b>1,980</b>	<b>2,337</b>
<b>Net surplus/(deficit)</b>	<b>(640)</b>	-	-

STATEMENT OF FINANCIAL POSITION	As at 31 March
\$000s	Actual 2022/23
<b>Assets</b>	
Bank	9,753
Debtors	2,728
Total current assets	12,481
Total non-current assets	-
<b>Total assets</b>	<b>12,481</b>
<b>Liabilities</b>	
Creditors and payables	2,104
Accrued Creditors – scholarships	11,017
Total current liabilities	13,121
Total non-current liabilities	-
<b>Total liabilities</b>	<b>13,121</b>
<b>Net assets</b>	<b>(640)</b>

STATEMENT OF CASH FLOW	For the 9 months to 31 March
<b>\$000s</b>	Actual 2022/23
<b>Cash flows from operating activities</b>	
Receipts from MFAT	16,957
Payments to scholarship providers, suppliers, employees and IRD	(19,204)
<b>Net cash flow from operating activities</b>	<b>(2,247)</b>
<b>Cash flow from investing activities</b>	
	-
Net increase/(decrease) in cash	(2,247)
Cash at the beginning of the year	12,000
<b>Cash at the end of the quarter</b>	<b>9,753</b>

ENZ received a \$12.0m starting float from MFAT on 6 December 2022 to ensure ENZ has sufficient working capital to cover MNZSP expenditure.

Account & Bank	Maturity date	% pa	% of total	\$m
ANZ (#002 Manaaki Account)	Cheque Account	1.90%	100.00%	9.753
<b>Total Cash at Bank</b>			<b>100.00%</b>	<b>9.753</b>

## ENZ's Impact, Performance and Organisational measures

### Impact measures

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On Track <sup>1</sup>	Comment
A. International student perceptions of education quality.	Increase	7.7 out of 10	7.7 out of 10		○	ENZ has contracted Kantar to conduct this survey for 2022/23 with results available in time for Q4 reporting.
B. Number of students studying towards a New Zealand qualification onshore and offshore <sup>2</sup>	Establish baseline	N/A	N/A		○	This measure relies on enrolment data for the 2022 calendar year. ENZ intends to report on this measure in Q4.
C. The economic value from New Zealand's international education sector. <sup>3</sup>	Increase	\$3.03 billion	\$790m		○	In 2020/21, ENZ commissioned a Broader Impact Valuation for the international education sector which has projected \$790m as the contribution of international education to GDP for 2021/22. Enrolment data for 2022 will be available in 2023.
D. The international education sector diversifies its offerings for international students	Establish baseline	N/A	N/A		○	This measure relates to ENZ providing a set of recommendations by September 2023 in line with the conditions of its CRRF funding.
E. The percentage of the international education sector's economic value coming from outside New Zealand's top two markets.	Increase	53%	Not measured		○	The methodology for the Broader Impact Valuation did not provide a value per market, and therefore this measure was not calculated or reported for 2021/22.
F. The percentage of international students enrolled to study outside Auckland. <sup>4</sup>	Increase	50%	50.3%		○	This result is based on enrolment data. ENZ intends to report on this measure in Q4.
G. The percentage of international students who were satisfied or very satisfied with their overall experience. <sup>5</sup>	Establish baseline	85%	Not a comparable measure		○	ENZ has renewed its contract for delivery. Survey questions have now been finalised, the data sample will be drawn by INZ and fieldwork will take place in April/May 2023. We expect top level results will be available in time for Q4 and full year reporting.
H. New Zealand institutions have improved quality of connections with international partners in key markets	Establish baseline	N/A	N/A		○	ENZ intends to report on this measure in its Annual Report 2022/23.
I. Increase in participation in the Prime Minister's Scholarships for Asia and Latin America by Māori and Pasifika	Establish baseline	N/A	N/A		✓	To date, for the individual PMSA awardees, 16/74 PMSA awardees identified as NZ Māori (22%) (compared with 5% from 2016-2019), and 8/48 PMSLA awardees identified as NZ Māori (17%) (compared with 8.2% from 2016-2019). We will report on all awardees (including group awardees) in Q4.

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

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

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

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

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

## Performance measures

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On track	Comment
Percentage of Active Visits on ENZ's studywithnewzealand.govt.nz website. <sup>6</sup>	≥ 75%	N/A	N/A	38.2%	✘	A data error was identified and reported on during Q2 that impacted the results for this measure. Additionally, the result has been impacted by the shift in website URLs from Study in New Zealand to Study with New Zealand. For quarter three, active visits were at an average of 70.6%, however the year to date active visits reflect the data error. There were no major issues reported, and we now have greater reporting tools available to track active visits.
Deliver recommendations on diversified products and services per CRRF funding requirements	Draft report completed by June 2023	N/A	N/A		✔	ENZ is on track to complete its work programme and deliver its recommendations by the end of the 2022/23 financial year. Under the New Products and Services workstream, Product Innovation Fund recipients have progressed their respective projects and Stage 2 funding has been released in all relevant cases, indicating that projects are on track. The New Zealand Owned Platform has been completed, launched and targeted marketing campaigns underway for late April and May. The programme team have a workshop with MoE coming up in May, to discuss initial findings, themes and recommendation in addition to the reporting framework
Number of impactful global connections to New Zealand providers in key markets. <sup>7</sup>	Establish baseline	N/A	N/A		○	ENZ intends to report on this measure in Q4.
Supporting the rebuild of the international education sector by leading the implementation of the government's Strategic Recovery Plan's 'Transforming to a more sustainable future state' workstream, with:						
- Improved confidence and resilience within the international education sector <sup>8,9</sup>	Achieved	N/A	N/A		○	We have refined some of the questions that are included in the Industry survey to capture sentiment around confidence and resilience. We plan to undertake the survey in Q4 and report the findings in ENZ's Annual Report for 2022/23.
- facilitating cross-government collaboration via the Chief Executives' Group and strengthening links with international Ministers <sup>10</sup>	Achieved	N/A	4 meetings		✔	This group has been superseded by ENZ's inclusion in the Economic Chief Executives' Forum. Further commentary is provided in the body of the report.
The percentage of facilitated customers that agree ENZ's services and support have added value to their organisation. <sup>11</sup>	≥ 85%	N/A	82%		○	We have refined some of the questions that are included in the Industry survey to capture sentiment around confidence and resilience. We plan to undertake the survey in Q4 and report the findings in ENZ's Annual Report for 2022/23.
The percentage of users satisfied with the information and intelligence provided by ENZ	≥ 87% of users rate it as good or higher	N/A	83%		○	We have refined some of the questions that are included in the Industry survey to capture sentiment around confidence and resilience. We plan to undertake the survey in Q4 and report the findings in ENZ's Annual Report for 2022/23.

<sup>6</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>7</sup> ENZ defines an 'impactful global connection' through a framework that accounts for reciprocity, a clear student, academic or research exchange or benefit, timeframe for potential outcomes of the connection and potential economic value to the institution and/or New Zealand.

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

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

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

<sup>11</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>12</sup> This result also reports on a measure from the 2022/23 Estimate of Appropriation

**Organisational capability**

	Target 2022/23	2020/21 Full Year Result	2021/22 Full Year Result	2022/23 YTD Result	On track	Comment
J. ENZ staff have undertaken te reo Māori and cultural training	Establish a baseline	N/A	N/A	83	✓	As of April 2023, 83 staff had completed courses 1-4 of Te Rito cultural training. This is from a headcount of 94 staff and accounts for staff changes over the quarter. Staff began courses 5-7 in January 2023. 6 staff have completed courses 5-7, 48 are in progress and 53 have not yet started. The due date to complete courses 5-7 of Te Rito is 14 July (Matariki).
Decrease ENZ's gross carbon emissions <sup>13</sup>	Establish a baseline	N/A	N/A		○	ENZ is working with CNGP and is consulting with similarly sized agencies to understand how changes can be implemented, so that when the baseline gross carbon emissions are reported, we are in a position to implement improvements.

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



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## Glossary

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

PROACTIVE RELEASE