



NZ INTERNATIONAL EDUCATION INDUSTRY

STRATEGIC ROADMAP

Final Summary

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

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FOREWORD

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

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

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

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

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

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



Grant McPherson
Chief Executive
Education New Zealand



OVERVIEW – HOW THIS ROADMAP WAS DEVELOPED

The development of a roadmap for New Zealand’s international education industry has been facilitated by Education New Zealand.

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

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

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

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

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



PURPOSE

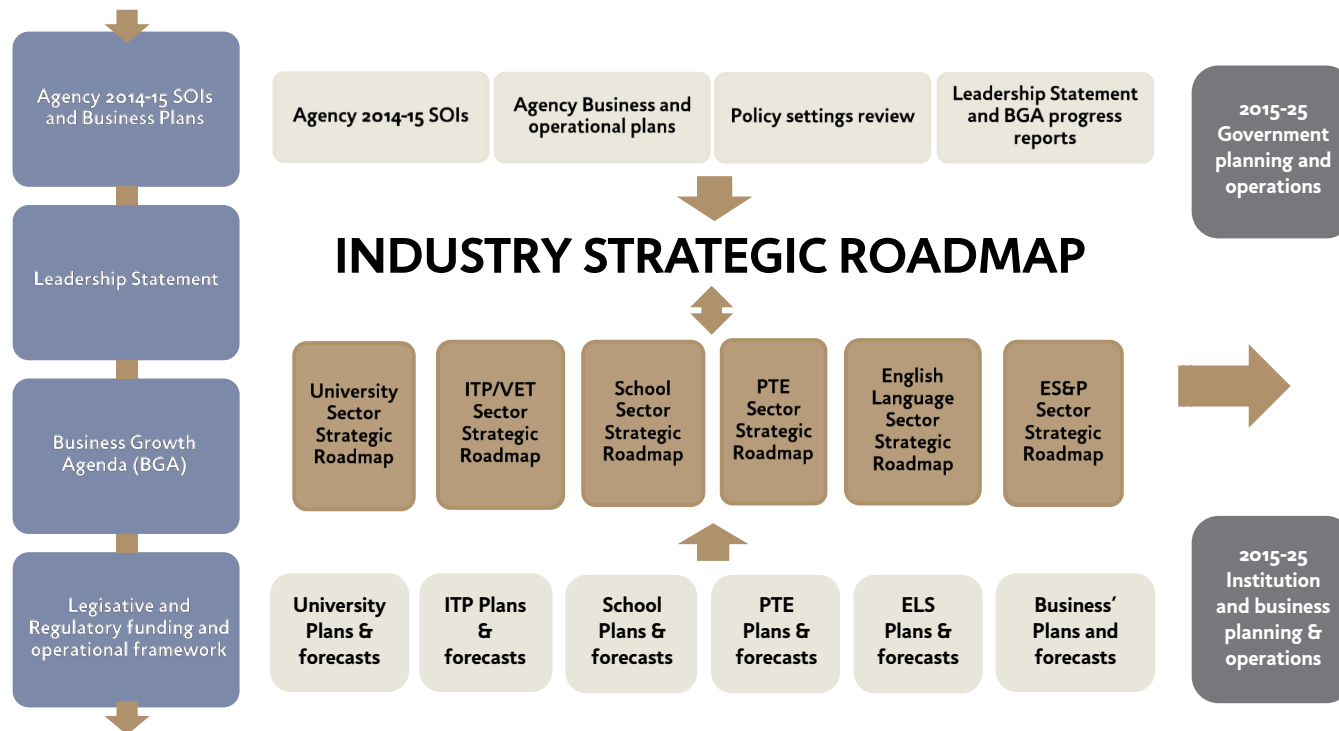
This roadmap has been developed by New Zealand's international education industry to guide its future growth and success towards 2025.

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

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

STRATEGIC LINKAGES

GOVERNMENT FRAMEWORK



The Government's role is to take the industry's view of the route to success and ensure the operating environment is as conducive to success as possible. There are a number of other documents that will form the strategic framework for the way ahead. The diagram to the left illustrates the connection between these documents and the strategic roadmaps.

INDUSTRY OPERATIONS

A photograph of two mountain bikers on a trail. The biker in the foreground is wearing a teal jacket, dark pants, and a white backpack, riding a blue and black mountain bike. The biker in the background is wearing a black jacket and pants, also on a mountain bike. They are on a dirt trail with snow-capped mountains in the background under a clear blue sky. The sun is low, creating lens flare effects.

THE NEW ZEALAND INTERNATIONAL EDUCATION INDUSTRY

THE NEW ZEALAND INDUSTRY

In 2013, 97,283 international students studied at New Zealand institutions onshore or offshore. New Zealand businesses also exported education related products, such as books and education technology. These activities combined contributed an estimated \$2.6 billion to the New Zealand economy.

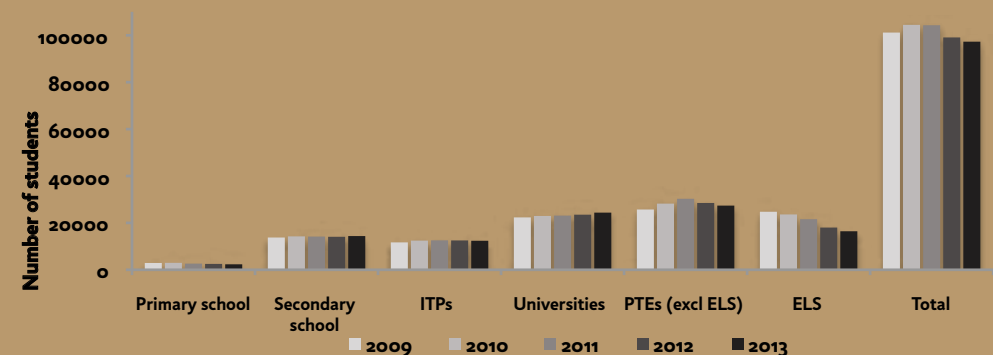
Today's New Zealand industry is diverse in scale, aspiration and capability. The primary focus of a large portion of the industry is student attraction activities, and most participants operate as individual entities with little collaboration with others.

The New Zealand industry is holding its own when it comes to delivering value to the New Zealand economy. But student numbers have been flat for the last three years and have not grown to levels predicted in 2010. There are a number of reasons for this and addressing these is a key part of government activity in this sector.

However a more diversified product offering and collaborative industry structure will provide more resilience and control for industry participants and more responsiveness to the fluctuations of the student attraction market.

The workshop process identified a number of strategic themes that have formed the basis for roadmap development:

- > **Resourcing:** investment, R&D and infrastructure
- > **Products and Pathways:** new product development and better utilisation of pathways
- > **Capability and Leadership:** leadership, commercial capability and professionalism
- > **Markets:** alumni, market intelligence and niche segments
- > **Partnership:** PPPs, government and industry collaboration





THE IMPACT OF GLOBAL TRENDS

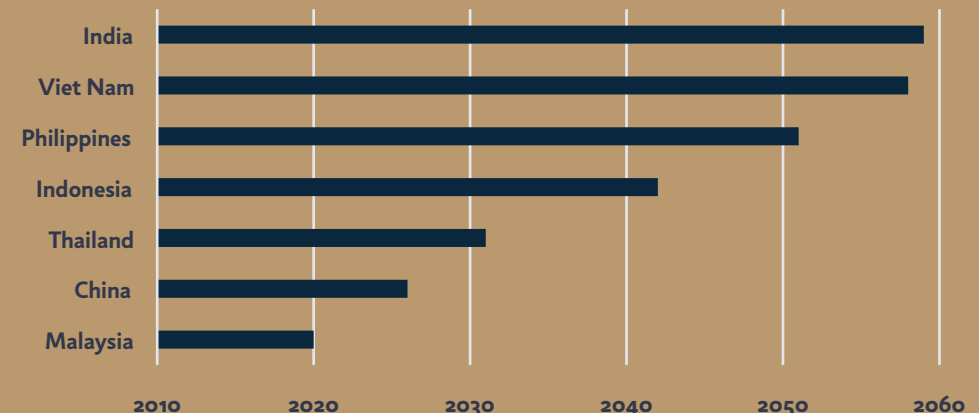
GLOBAL MEGA TRENDS

It's a rapidly changing world. Shifts in world economic and political power have changed the traditional centre of influence from west to east and brought it significantly closer to us.

Combine this with a doubling of global wealth over the last ten years and an emerging large middle class centred on Asia, and the outlook for international education is bright. A number of global mega trends have shaped the world's economic direction and the drivers that lead to student and workforce mobility.

- > Demographic changes
- > Shifting global economic power
- > Growing wealth
- > Growing middle class
- > Mobility not migration
- > Access to technology
- > Climate change and the battle for natural resources
- > Automation
- > Urbanisation

These trends have implications for where future demand for international education will come from. As economies mature and become more middle class there is a greater demand for skills development at home, and parents have the resources and expectations that their children will have access to higher education. Some traditional student markets may no longer be dominant (e.g. South Korea) and new markets will open up for both on and offshore education (e.g. South East Asia and Africa).



"best scenario" simulation of estimated time required to become high-income countries for middle-income countries in emerging Asia (years) Source: OECD

STUDENT MOBILITY TRENDS

Over the last three to five years a number of student mobility trends have emerged.

The major student flows in the next 10 years will continue to be from China and India to traditional host countries, such as the United States and United Kingdom. Saudi Arabia, Nigeria, Nepal, Pakistan, Iraq, Brazil, Turkey and Indonesia will also emerge as important student origin and service markets. Together these will account for over seven million students looking for an international education in 2025 with many more millions being internationally educated at home.

Traditional student source countries are now repositioning as competitors. This includes Malaysia, Taiwan, South Korea, Japan, Singapore and China, which are attracting increased numbers of international students in the Asian region.

Students are venturing offshore for education at a younger age, especially from China. But lifelong learning is also emerging as an important trend.

Although a number of students are still looking for an education package that is linked to employment and migration, mobility is increasingly replacing migration.

By 2024, India, China, Indonesia and the United States will be home to over 50 percent of the world's 18-22 year old population, despite the fact that the Chinese tertiary-aged population is projected to fall by roughly 40 million in the next decade



NEW DEVELOPMENTS IN LEARNING

These global mega trends are impacting on the demand for and delivery of international education and the international education landscape is evolving as a result.

Education development is being driven by the private sector, which is well-resourced to invest in new technological solutions to education demands. The line between education providers and future employers is becoming blurred as skills become more specific and technical.

A number of key developments have emerged in learning and international education over the last five years. New Zealand providers need to integrate these into their offerings to continue to meet student demand:

- > Younger students offshore (especially Chinese) but at the same time an evolution of “lifelong learning”
- > Disaggregating course modules
- > Broken connection between content and assessment
- > Packaging of study with tourism, accommodation and travel
- > Shorter course options
- > Increased demand for higher education offshore
- > Demand for skills, including entrepreneurialism, innovation, digital literacy and creativity
- > Employment-ready graduates
- > Technology changing where and when learning happens and the role of the teacher
- > Greater use of apps for learning and cloud-based education
- > Increased funding for study abroad schemes
- > Changing from qualifications to “badging”.

THE RISE OF GLOBAL EDUCATION AT HOME

Demand for higher education is growing worldwide. Increasingly emerging economies want to educate their students at home.

The growing middle class will demand better quality in-country education and be less likely to travel for quality education offerings that may cost more.

Transnational Education (TNE) can help host countries upgrade their education systems through international partnerships and offshore campuses or can add options to a regional education hub.

TNE is not simply about revenue but can also help broaden and deepen faculty and research links and two-way student mobility.

It can cater to 'glocal' students – those aspiring to a foreign qualification but who may not have the academic ability or financial means to study far from home or full-time.

And technology will transform higher education enabling more online delivery of education anywhere at any time. Online enrolments have increased at rates far in excess of overall higher education as it becomes more accepted.

- > There are currently a greater number of students studying for UK degrees outside of the UK than there are within it. As of the 2011/12 academic year, 571,000 students were enrolled in UK offshore programmes, up from 196,740 in the 2007/08 year
- > By 2020 OECD data predicts that demand for transnational education will reach 500,000 in Asian.

A man with glasses and a mustache, wearing a light blue button-down shirt and a patterned tie, stands in front of a wall covered in educational posters. The posters include words like 'bigger', 'giant', 'big', and 'jumbo'. The man is looking slightly to the right of the camera with a neutral expression.

DRIVERS OF CHANGE IN NEW ZEALAND

Global mega trends and emerging learning trends have fostered an international education environment where innovation and adaptation is necessary and rewarded.

In addition local developments have also provided drivers of change for New Zealand institutions and businesses.

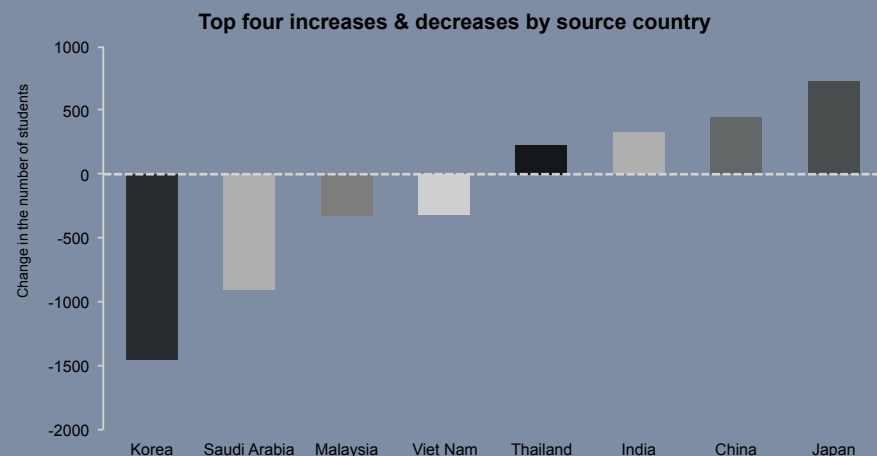
DRIVERS OF CHANGE

An over-reliance on a few key markets

Apart from China, New Zealand institutions are also heavily reliant on India, South Korea, Japan and Saudi Arabia for both student attraction and in-country service delivery activities. This leaves our industry exposed to the fall out from a major incident or event. Diversifying our markets is a key driver for change.

Declining traditional markets in some sectors

Some sectors have built their success on a few key markets which are currently experiencing dramatic decline. South Korean school student numbers have reduced dramatically over the last decade, primarily due to local social and economic pressures. To a lesser extent Saudi Arabian English language and Malaysian university numbers have also declined.



Need for diversified funding sources (government, international, private)

Institutions need to meet expectations that they will be more self-reliant in their funding structures.

Increased demand for quality infrastructure (e.g. technology and accommodation)

Institutions and businesses need to invest international student revenue into high quality infrastructure that will continue to meet student expectations.

Greater demand for internationalisation from New Zealand students

New Zealand students are beginning to expect and value a more international experience.

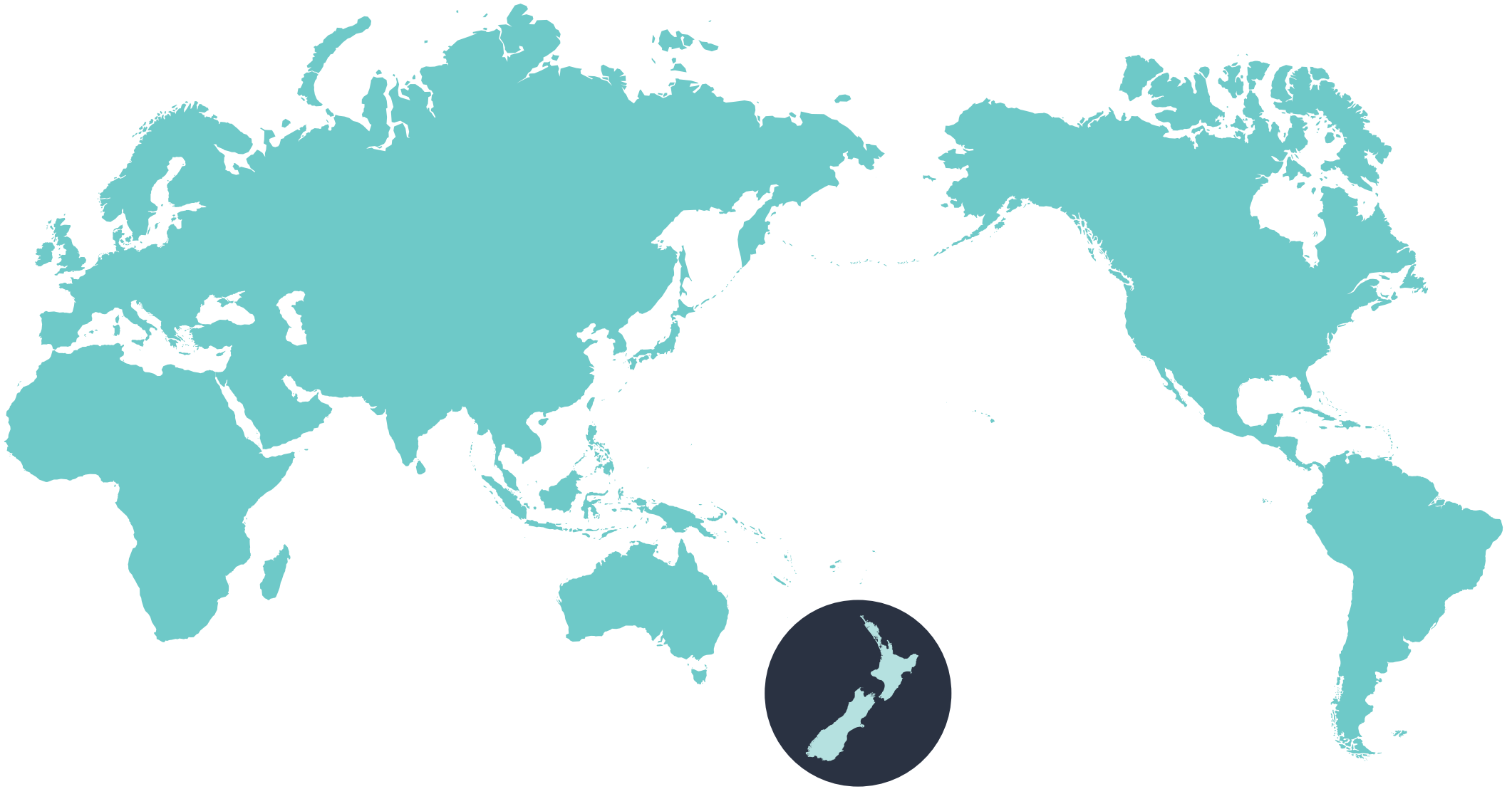
International competition for research excellence

New Zealand higher education institutions are aware of the pressure to increase international rankings through quantity and quality research output.

High New Zealand dollar

Although there is some debate about the price sensitivity of the international education market, there is no doubt that students and governments are increasingly looking for a cost effective education solution.

OUR COMPETITORS



New Zealand

OUR COMPETITORS

Traditional competitors

New Zealand's traditional competitors in the international education market are Australia, the United States, the United Kingdom and Canada. Over the last ten years there has been a continuation of the worldwide trend away from government funding for tertiary education and this has resulted in greater competition for international students and the revenue they bring. Everyone has upped their game in both student recruitment and offshore service consultancy.

New competitors

At the same time as our traditional competitors have been aggressive in cementing their position, new competitors have also emerged. New Zealand's competitors now also include most of Asia (particularly Malaysia, Hong Kong and Singapore), Turkey, the Middle East, Russia and Europe. Niche participants include the likes of Malta, that increased English language training to around 90,000 students in 2013.

These countries are particularly appealing to the “glocal” student, that seeks an international education experience that is close to home, cost effective and in familiar cultural and religious surroundings.

Private education providers are also leading the way in innovation and market development.

New delivery methods

Increasingly New Zealand's competitors in the international education market are attracting students and governments with a technological solution that is cost effective, scalable and flexible. Learning and assessment can take place anywhere at any time.

How can and should New Zealand respond to these developments? What can we adapt to complement our existing strengths and niches?

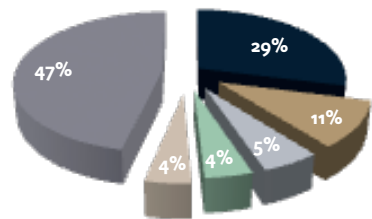
We need to keep one eye on what makes a New Zealand education experience unique.



COMPETITOR ANALYSIS

Australia

245,000 students (500,000 enrolments in 2012). Strong growth is predicted to overtake capacity by 2025. While their traditional markets China, India and South Korea have declined, strong growth is emerging in non-traditional markets such as Viet Nam, Pakistan, Colombia, Philippines, Spain, and Italy.

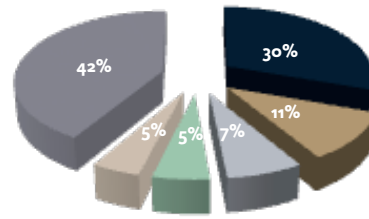


■ China
■ India
■ Vietnam
■ Malaysia
■ Korea
■ Others

Canada

International student enrolments in Canada grew from 136,000 in 2001 to over 265,000 (500,000 enrolments) in 2012 – a 94% increase.

The top five countries of origin are China, India, South Korea and Saudi Arabia.

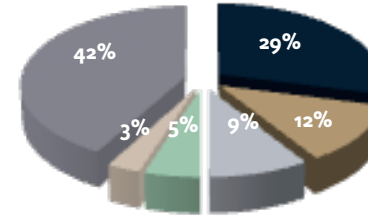


■ China
■ India
■ Saudi Arabia
■ USA
■ South Korea
■ Others

United States

The number of international students at colleges and universities in the United States increased by seven percent to a record high of 819,644 students in 2012/13.

China is up 21% to 237,597, Saudi Arabia up 31% and Kuwait up 37%.

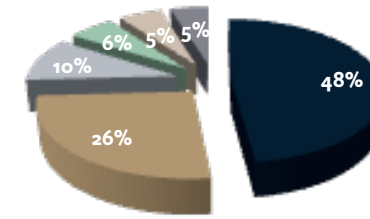


■ China
■ India
■ Saudi Arabia
■ Canada
■ South Korea
■ Others

United Kingdom

Growth in non-EU international student enrolments in the United Kingdom universities have stalled, with the total up just 2% last year, compared with 5.5% in 2010/11.

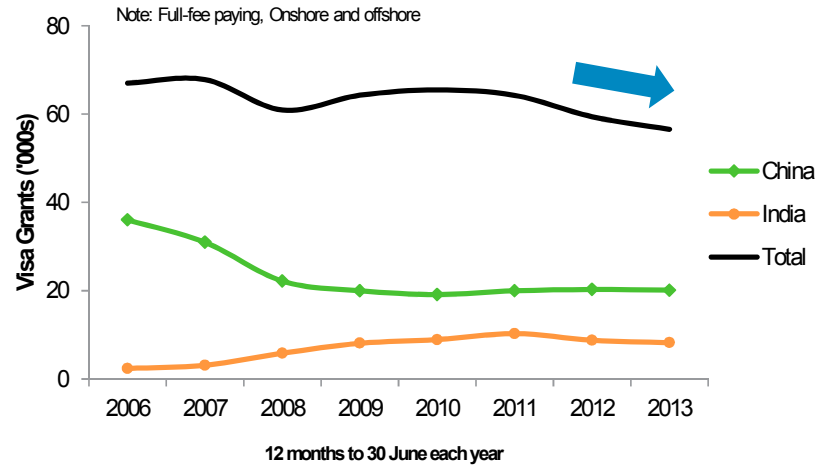
However, some countries (Singapore, Vietnam and Indonesia) are showing strong growth.



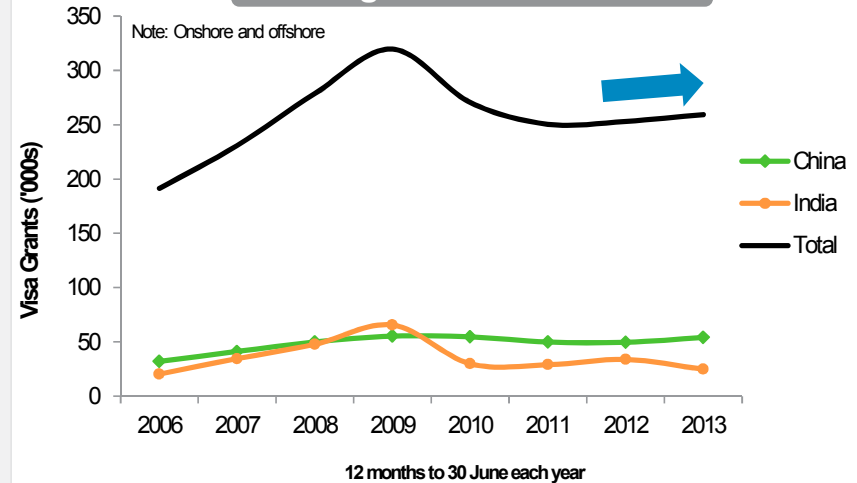
■ Other non EU
■ China
■ Nigeria
■ United States
■ India
■ Malaysia

VISA TRENDS AMONGST OUR COMPETITORS

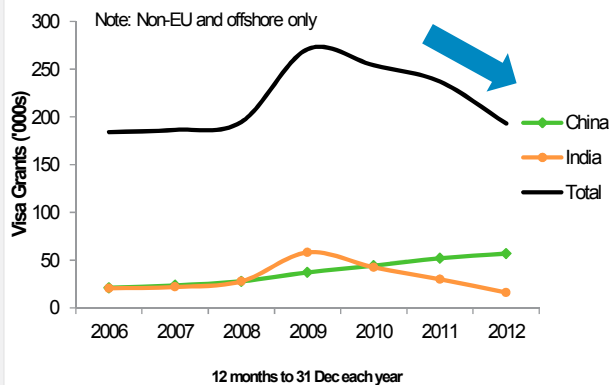
Visa grants to New Zealand



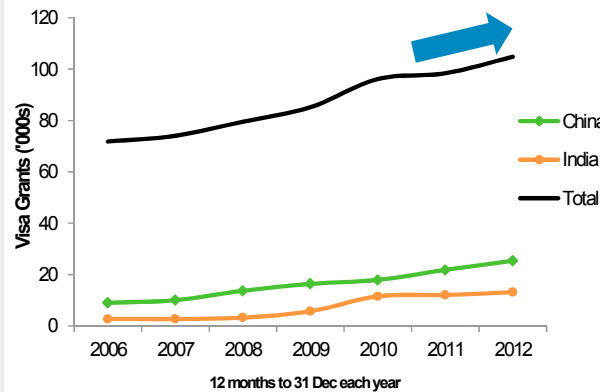
Visa grants to Australia



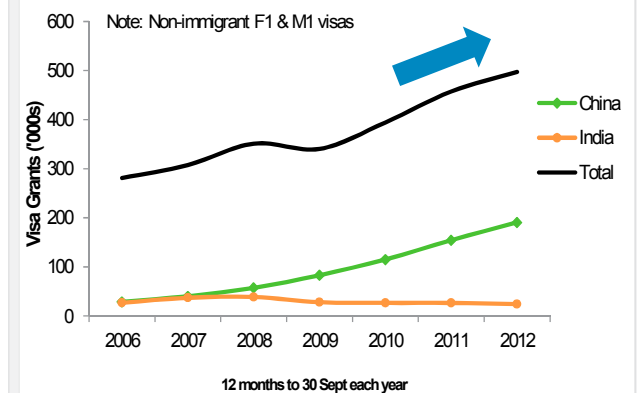
Visa grants to the UK



Visa grants to Canada



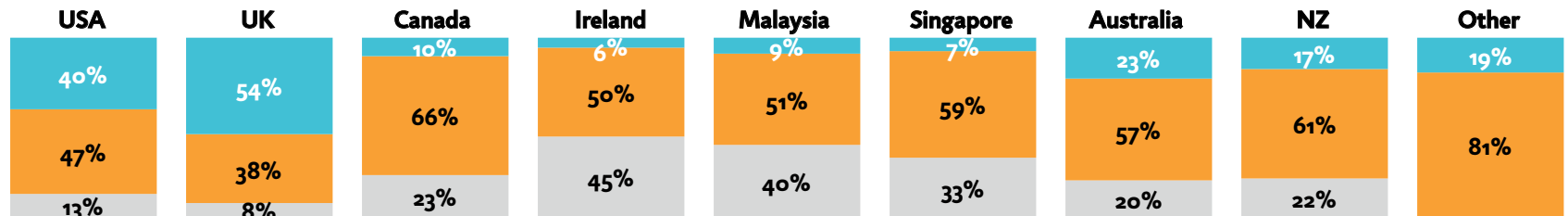
Visa grants to the US



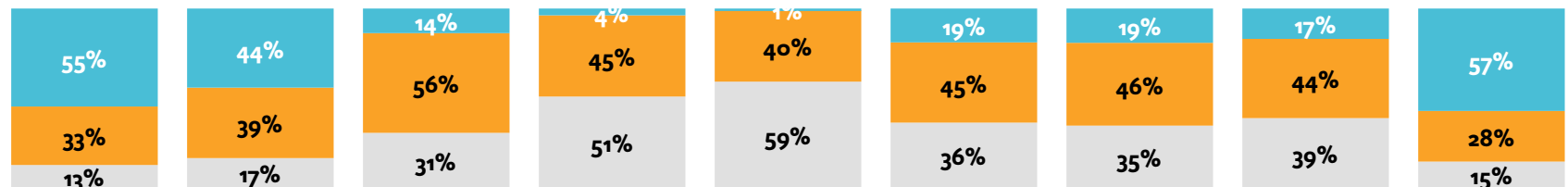
A STABLE COHORT OF STRONG CONNECTIONS TO NEW ZEALAND

Degree of preference for English speaking study destination (amongst those considering English speaking destinations)

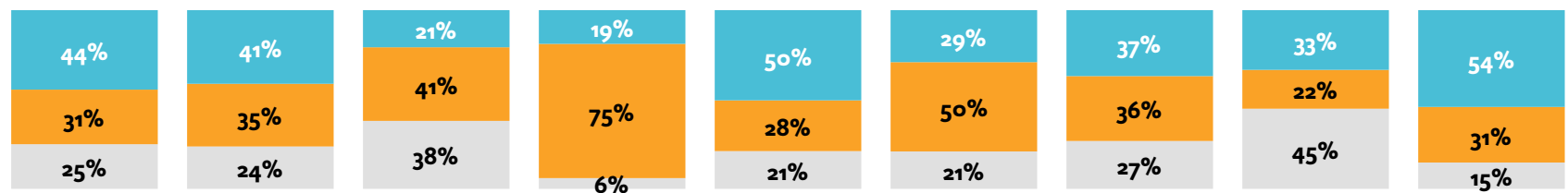
China⁽¹⁾



India⁽²⁾



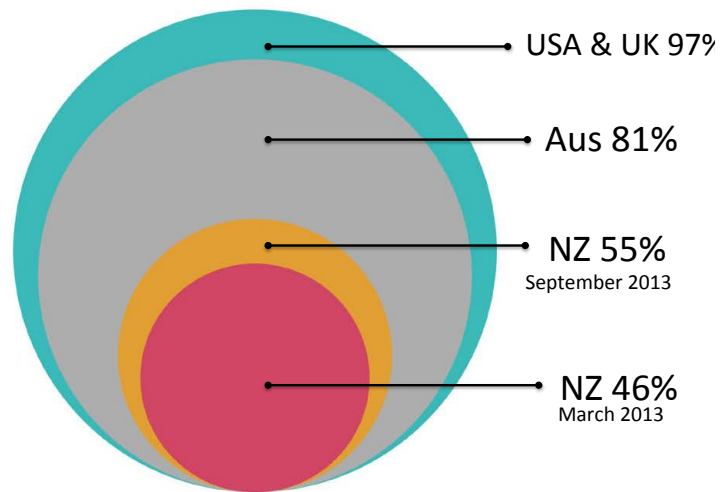
Indonesia⁽³⁾



■ Most preferred country to study in
 ■ Not preferred but I'd be happy to go there
 ■ Would consider but only if I had to

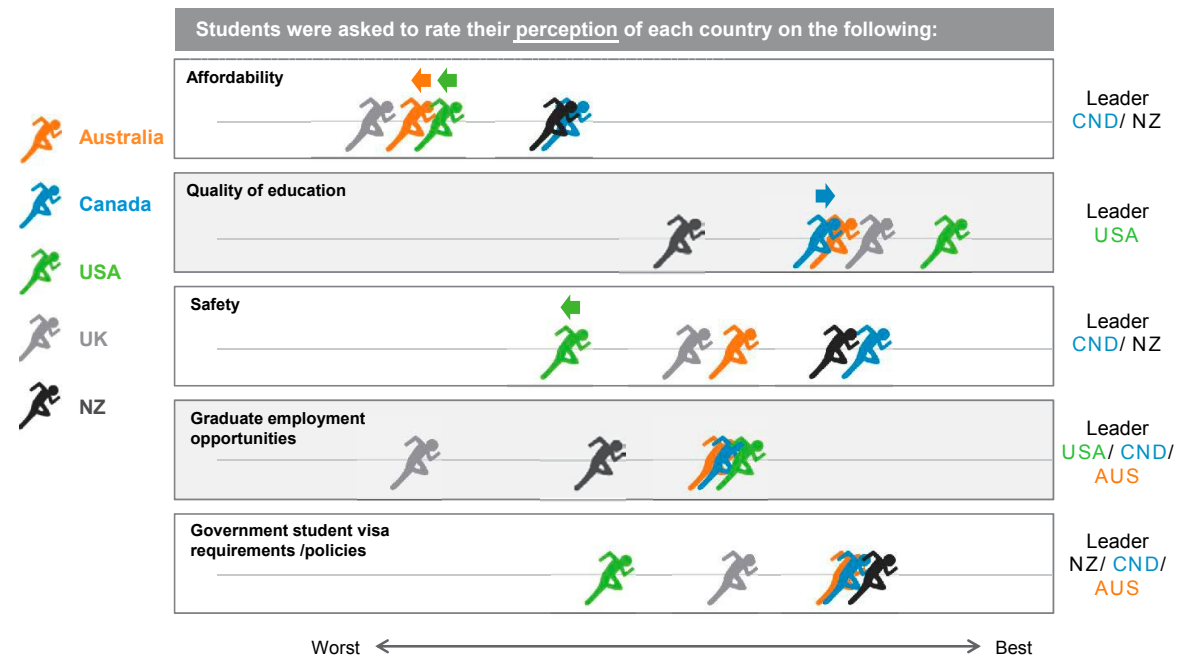
OUR BIGGEST CHALLENGE REMAINS LOW AWARENESS

Education Brand Awareness



Source: TNS Research

But we have some competitive advantages too...



Source: IDP

DESTINATION 2025



DESTINATION 2025

		CURRENT	2025 SCENARIO 1	2025 SCENARIO 2
PARTICIPATION	Number of international education providers	928	1,037	1,120
ENROLMENT	Students	97,283	143,182	182,758
	Average students per provider	108	138	163
VALUE	Tuition fee income	\$0.8 B	\$1.5 B	\$1.9 B
	Tuition fees per student	\$8,258	\$10,316	\$10,238
	EVA	\$2.6 B	\$4.8 B	\$6.2 B

The 2025 scenarios for the overall industry have been made by combining the underlying individual sector scenarios. Refer to each sector roadmap for an explanation of the underlying assumptions and drivers for each 2025 scenario.

DESTINATION 2025

		CURRENT	2025 SCENARIO 1	2025 SCENARIO 2
PARTICIPATION	Number of international education providers	8	8	8
ENROLMENT	Number of onshore international students	23,884	30,007	35,550
	Average students per University	2,986	3,751	4,444
VALUE	Tuition fee income	\$376m	\$635m	\$752m
	Tuition fees per student	\$15,746	\$21,162	\$21,163
	EVA	\$963m	\$1,534m	\$1,818m

		CURRENT	2025 SCENARIO 1	2025 SCENARIO 2
PARTICIPATION	Number of international education providers	167	220	200
ENROLMENT	Students	27,371	41,359	54,000
	Average students per PTE	164	188	270
VALUE	Tuition fee income	\$190m	\$347m	\$460m
	Tuition fees per student	\$4,864	\$8,404	\$8,404
	EVA	\$569m	\$1,028m	\$1,354m

University Sector

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

PTE Sector

		CURRENT	2025 SCENARIO 1	2025 SCENARIO 2
PARTICIPATION	Number of international education providers	50	45	65
ENROLMENT	Students	16,429	19,643	33,058
	Average students per ELP	329	437	509
VALUE	Tuition fee income	\$36m	\$54m	\$102m
	Tuition fees per student	\$2,173	\$2,756	\$3,098
	EVA	\$316m	\$479m	\$813m

ITP Sector

English Language Sector

DESTINATION 2025

		CURRENT	2025 SCENARIO 1	2025 SCENARIO 2	
PARTICIPATION	Number of international education providers	594	636	699	
		283 (1 st) 311 (2 nd)	307 (1 st) 329 (2 nd)	352 (1 st) 347 (2 nd)	
ENROLMENT	Students**	16,720	23,471	27,923	
		2,337 (1 st) 14,383 (2 nd)	2,964 (1 st) 20,507 (2 nd)	3,531 (1 st) 24,392 (2 nd)	
		Average students per School	28	37	40
		8 (1 st) 46 (2 nd)	10 (1 st) 62 (2 nd)	10 (1 st) 70 (2 nd)	
VALUE	Tuition fee income	\$122m	\$220m	\$262m	
		Tuition fees per EFTS	\$4,440 (1 st) \$7,767 (2 nd)	\$5,684 (1st) \$9,896 (2nd)	\$5,684 (1st) \$9,896 (2nd)
		EVA**	\$359m	\$611m	\$726m

School Sector

		CURRENT	2025 SCENARIO 1	2025 SCENARIO 2
PARTICIPATION	Number of exporters	91	110	130
ENROLMENT	Offshore students	3,000	10,000	10,000
	Average students per provider			
VALUE	Tuition fee income			
	Tuition fees per student			
	EVA	\$104m	\$502m	\$742m

ES&P Sector

INDUSTRY ROADMAP STRATEGIC THEMES

Markets

Products and
Pathways

Resourcing

Capability
and
Leadership

Partnership

MARKETS OVERVIEW

To achieve transformational economic growth, we will leverage the New Zealand country brand, our quality in-market relationships and the full value of our alumni and business networks.

We will tell the New Zealand Education Story to a larger audience within highly targeted segments and a more diversified range of markets.

We will use market intelligence to better understand the needs of the customer and digital channels to reach our defined audience.

STRATEGIC CHOICES — MARKETS

1

Build a strong New Zealand education industry brand and sector brands

2

Create and share relevant and timely market research and intelligence

3

Use offshore alumni as New Zealand education ambassadors

4

Improve engagement with and effective use of agents

5

Partner with offshore institutions to create a pipeline of students to New Zealand

6

Build on existing markets while also diversifying into new markets

MARKETS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
1	Build a strong New Zealand education industry brand and sector brands	Develop a strong New Zealand education industry brand and strong sector brands for each sector (School, English Language, PTEs, ITPs/VET, University, ES&P)	■	■	■
		Establish a 'Quality Code' and 'Qualmark' with criteria for quality	■	■	■
		Develop a New Zealand "Imprimatur" quality brand	■	■	■
		Rename / rebrand ITPs and PTEs to achieve greater international recognition	■	■	■
2	Create and share relevant and timely market research and intelligence	Collate and share best practice knowledge on how to grow internationally	■		
		Provide sector-relevant intelligence on geographic and demographic markets, political and cultural landscapes	■		
		Produce regular reports on significant market opportunities and competitor behaviour to inform product development and mitigating actions	■		
3	Use offshore alumni as New Zealand education ambassadors	Tell emotional / hero stories about well-known offshore expatriate and international alumni to publicise the value of New Zealand qualifications	■	■	■
		Use social networking systematically to increase customer awareness, secure brand loyalty and collect and respond to customer feedback	■	■	■

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

MARKETS

		DURATION (YEARS)		
STRATEGIC CHOICES	SPECIFIC ACTIONS	0 - 3	3 - 5	5 - 10
4 Improve engagement with and effective use of agents	Create a code of practice for onshore and offshore recruitment agents and for the institutions who engage those agents	Government		
	Survey agents annually to understand the features of our system that are easiest and hardest to sell	Government		
5 Partner with offshore institutions to create a pipeline of students to New Zealand	Develop more articulation / twinning / foundation / joint programmes and study abroad relationships with educational, government and commercial partners to capture the opportunities that emerge as overseas institutions and systems develop and strengthen	Sector	Sector and Government	Sector and Government
6 Build on existing markets while also diversifying into new markets	Enable growth from existing markets by improving marketing, raising the profile of New Zealand, and removing barriers to entry	Government	Government	
	Implement a NZ Inc. approach to target markets, new and existing	Government	Government	
	Reduce barriers to entry into new markets through shared services and effective use of market intelligence	Government	Government	
	Support shared marketing activities, working with clusters of providers to increase scale	Government	Government	

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

PRODUCTS AND PATHWAYS OVERVIEW

To achieve transformational economic growth, high quality, niche education products will be developed that meet the future needs of global students in fields where we have a competitive advantage.

Delivery will be more diversified, including the use of offshore and blended learning. We will strengthen pathways within our education system and to employment and residency.

Concurrently, the quality of student/family support and experience will be enhanced by standardising best practice and working collaboratively with related industry sectors (such as tourism).

STRATEGIC CHOICES – PRODUCTS AND PATHWAYS

1

Develop niche courses and programmes that align with New Zealand's unique attributes and market needs

2

Develop coherent and integrated education pathways for students from pre-enrolment to permanent residency

3

Focus on developing excellence in distance education, blended learning and digital delivery

4

Develop and package New Zealand study experiences

5

Align product development to customer needs

6

Strengthen pathways between the education system and employers both onshore and offshore

PRODUCTS AND PATHWAYS

		DURATION (YEARS)		
STRATEGIC CHOICES	SPECIFIC ACTIONS	0 - 3	3 - 5	5 - 10
1 Develop niche courses and programmes that align with New Zealand's unique attributes and market needs	Develop programmes linked to export priorities and export businesses	■	■	■
	Offer focused / interdisciplinary qualifications in fields for which New Zealand is renowned, globally identified or geographically advantaged	■	■	■
	Develop programmes for 'second tier' academic pathway students	■	■	■
	Time course commencement to better align with northern hemisphere academic calendars	■	■	■
	Commercialise short-term group programme delivery for schools aimed at students, parents or offshore teachers	■	■	■
2 Develop coherent and integrated education pathways for students from pre-enrolment to permanent residency	Develop clearly articulated and coherent pathways into undergraduate and postgraduate study	■		
	Design and implement an 'entry guarantee' to New Zealand tertiary education from New Zealand schools	■		
	Strengthen recognition and incentives for primary to secondary pathways within local regions	■		
	Make study and work visas generic across labour market skill shortage areas to prioritise immigration in these areas	■		
	Develop qualifications linked to INZ skill shortage priorities	■		
	Ring-fence permanent resident visas for skill shortage areas / priorities	■		

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

PRODUCTS AND PATHWAYS

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
3	Focus on developing excellence in distance education, blended learning and digital delivery	Develop online, distance and blended courses that act as tasters for / provide pathways to onshore qualifications	■	■	■
		Offer online pre-departure in-country induction programmes to prepare students for study in New Zealand	■	■	■
		Accelerate the development and delivery of blended learning via diverse platforms including gamification, apps, wikis and MOOCs	■	■	■
4	Develop and package New Zealand study experiences	Negotiate bulk deals with airlines, banks, and tourism, transport or telecommunications companies to reduce costs beyond the classroom and expand extra-curricula experiences	■		
5	Align product development to customer needs	Identify and market courses, degrees and products that are in demand internationally	■	■	■
		Offer New Zealand qualifications that involve study at multiple New Zealand institutions to capitalise on the expertise that exists within our education system	■	■	■
6	Strengthen pathways between the education system and employers both onshore and offshore	Integrate work placements and internships in tertiary qualifications for international students	■		
		Develop and position NCEA as an international qualification	■	■	

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

RESOURCING OVERVIEW

To achieve transformational economic growth, capable industry providers -individually or in clusters- will have access to capital for investment in product, infrastructure and market development.

Investments will be made on normal commercial terms with the expectation that the long-term return will be sound and sustainable.

Where appropriate, partnerships between public and private sector partners will be encouraged to increase scale within the industry.

STRATEGIC CHOICES — RESOURCING

1

Provide incentives for international revenue growth

2

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

3

Invest in accommodation infrastructure

4

Invest in student experience to ensure 'hygiene factors' are improved

5

Align investment with capability, quality and growth potential

6

Collaborate for offshore projects

RESOURCING

		DURATION (YEARS)		
STRATEGIC CHOICES	SPECIFIC ACTIONS	0 - 3	3 - 5	5 - 10
1 Provide incentives for international revenue growth	Develop effective and positive mechanisms to incentivise providers and their staff to grow international initiatives and revenues, especially offshore			
	Allow public tertiary institutions more flexibility in deploying their balance sheets so they are more able to finance and assume the risks involved in international education growth initiatives			
2 Enable better access to capital and R&D for international growth and risk sharing	Align domestic investment in disciplines and facilities in areas that will also likely generate international revenue growth			
	Provide a pool of capital / co-investment fund as an alternative to develop international initiatives that do not rely solely on institutions' own resources for risky but high value projects			
	Establish a New Zealand quality-assured homestay network			
3 Invest in accommodation infrastructure	Form public-private partnerships to establish additional accommodation capacity			
	Package ultra fast broadband offerings for homestay providers and international students			
4 Invest in student experience to ensure 'hygiene factors' are improved	Negotiate nation-wide public transport discounts for international students			
	Ensure there is a continuous supply of accredited New Zealand quality-assured homestay providers			

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

RESOURCING

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
5	Align investment with capability, quality and growth potential	Develop governance capability for collaborative offshore projects	■	■	■
		Prioritise international education investment into both collaborative and commercial ventures of impact and scale	■	■	■
		Source property and infrastructure support for growth initiatives	■	■	■
6	Collaborate for offshore projects	Identify and broker opportunities for New Zealand providers to collaborate in offshore delivery	■		
		Develop a single shared commercial entity for NZ VET providers to jointly deliver projects offshore	■		
		Develop a shared universities commercialisation entity to jointly deliver projects offshore	■		

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

CAPABILITY AND LEADERSHIP OVERVIEW

To achieve transformational economic growth, industry leadership will clearly define and articulate a vision and strategy for change.

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

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

STRATEGIC CHOICES – CAPABILITY AND LEADERSHIP

1

Market the value of international students to New Zealanders

2

Professionalise the industry

3

Align recruitment and admissions policy / processes across the sector

4

Government agencies take a joined up customer-centric approach

5

Improve national leadership and governance skills

CAPABILITY AND LEADERSHIP

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
1 Market the value of international students to New Zealanders	Develop a campaign to market the value of international students to New Zealanders, to show students, employers, academics, media and the public their social, cultural and pedagogical importance and to dispel the notion that they displace local students			
	Provide incentives for academics to encourage them to support international students, foster collaboration between international and domestic students, and consider international student demand in course and programme design			
2 Professionalise the industry	Offer regular professional development courses to international education administrators			
	Provide opportunities for key academic and admissions staff to visit priority markets to grow their understanding and awareness of market conditions and opportunities			
	Recruit experienced business development staff with international and commercial experience			
3 Align recruitment and admissions policy / processes across the industry	Review sector-wide admissions processes and establish a sector-owned best practice approach around converting enquiries into enrolments			
	Extend the existing framework for recognition of offshore qualifications			
	Pilot offshore foundation programmes that provides students with entry into New Zealand-based courses			

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

CAPABILITY AND LEADERSHIP

	STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
			0 - 3	3 - 5	5 - 10
4	Government agencies take a joined up customer-centric approach	Incentivise public sector leaders to contribute to economic growth	■		
		Encourage MoE and NZQA to engage with and improve support to educational exporters	■		
5	Improve national leadership and governance skills	Ensure governance skillsets in public providers include international education and commercial expertise	■	■	■
		Design and implement boards of trustees internationalisation training and resources	■	■	■

KEY RESPONSIBILITY

Sector
 Sector and Government
 Government

PARTNERSHIP OVERVIEW

To achieve transformational economic growth, we will deliver a greater level of cohesiveness within the industry, government and private sector.

We will benefit from increased scale, capacity, and efficiencies by using a range of collaborative models between providers; locally, regionally and nationally.

Our approach to the international marketplace will be as a joined up 'NZ Inc.' team, while still retaining our individual freedom and independence.

STRATEGIC CHOICES — PARTNERSHIP

1

Increase collaboration and integration within and between industry and government

2

Strengthen cohesion across all education sectors and with relevant export businesses

3

Develop a stronger NZ Inc. approach for collaboration to achieve scale

4

Develop business models for collaboration by providers, regions and related industry partners

PARTNERSHIP

STRATEGIC CHOICES	SPECIFIC ACTIONS	DURATION (YEARS)		
		0 - 3	3 - 5	5 - 10
1 Increase collaboration and integration within and between industry and government	Ensure government agencies and their staff both onshore and offshore have a common and agreed understanding of the importance of international education	Government	Sector and Government	Sector and Government
	Align operational policies around immigration and other settings to effectively support international education growth	Government	Government	Sector and Government
	Include international education in the KPIs of MFAT and NZTE officials in selected posts lacking ENZ staff so opportunities are not missed	Government	Sector and Government	Sector and Government
2 Strengthen cohesion across all education sectors and with relevant export businesses	Undertake joint market-specific promotions across sectors using shared market intelligence and to reduce costs	Sector and Government		
	Establish flexible entry criteria at multi-entry points to tertiary programmes	Sector and Government		

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

PARTNERSHIP

		DURATION (YEARS)		
STRATEGIC CHOICES	SPECIFIC ACTIONS	0 - 3	3 - 5	5 - 10
3 Develop a stronger NZ Inc. approach for collaboration to achieve scale	Develop a VET sector collaboration strategy between ITPs, ITOs, PTEs and government to take advantage of offshore opportunities	■	■	■
	Major public tertiary providers to collaborate around physical presence in key offshore markets	■	■	■
	Combine New Zealand content / expertise with global technology companies and platforms	■	■	■
	ENZ to work with NZTE and Tourism NZ – joined up activities with shared market intelligence and shared services	■	■	■
4 Develop business models for collaboration by providers, regions and related industry partners	Work with local government organisations to develop and resource regional and multi-regional strategies to attract international students	■	■	
	Expand partnerships with tourism operators	■	■	
	Implement shared services – marketing, applications, SMS – across groups of providers to reduce costs and improve outcomes	■	■	
	Create shared models for international student recruitment for small providers and for offshore project delivery	■		

KEY RESPONSIBILITY

- Sector
- Sector and Government
- Government

NEXT STEPS



SUPPORTING YOUR JOURNEY TO SUCCESS IN 2025...

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

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

YOU'RE IN THE DRIVING SEAT NOW

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

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

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

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