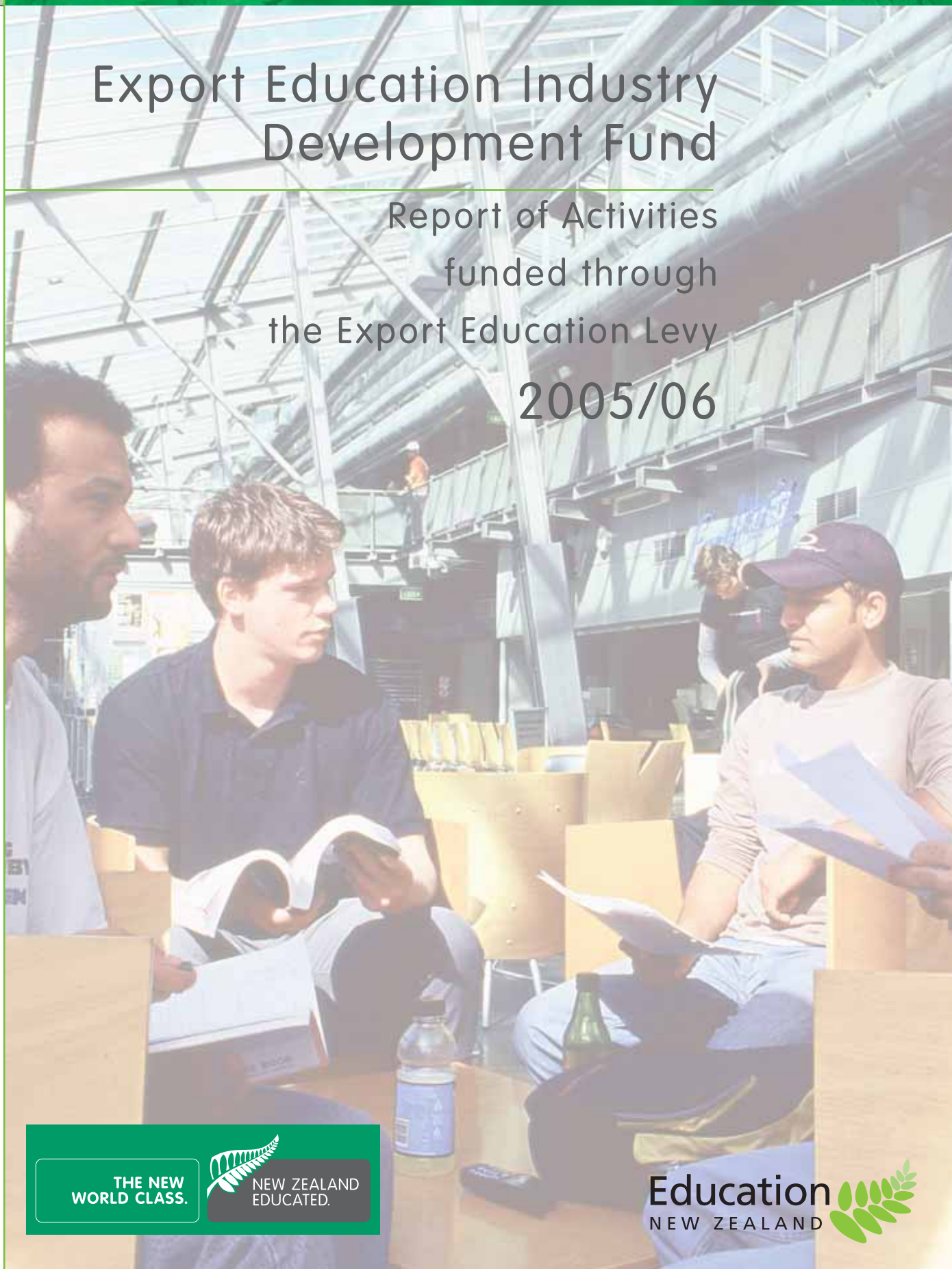




Export Education Industry Development Fund

Report of Activities
funded through
the Export Education Levy
2005/06



THE NEW
WORLD CLASS.



NEW ZEALAND
EDUCATED.

Education
NEW ZEALAND





1. Introduction

Since 2003, all institutions have paid a percentage of gross international student fees into the Export Education Industry Development Fund, better known as the 'Levy' (the name by which it will be referred to throughout this document). On 1 July 2004 the Ministry of Education devolved responsibility for managing some Levy funds to Education New Zealand. This report is on the levy funded outputs managed by Education New Zealand.

Education New Zealand is now responsible for managing the following industry development work streams:

- Policy, advocacy and information
- Research
- Professional Development
- Generic Promotion
- Quality Assurance

Where does the Levy money go?

Education New Zealand does not collect or hold the Levy. The Levy is collected by the Ministry of Education. Education New Zealand works with the Ministry on an annual financial year basis to draw up an overall work plan and decide the overall allocation of funds to the various output areas that are managed by ENZ on behalf of industry. Government makes appropriations to support this, with the amount being 'recompensed' to Government via the Levy. During 2005/06 there was a shift in emphasis towards generic promotion to respond to the increasingly competitive offshore recruitment environment.

Levy split by output class: 2005/06

Research	= \$144,000
Promotion	= \$1,173,000
Professional Development	= \$251,000
Quality Assurance	= \$17,000
Total	= \$1,585,000

The Levy is applied to other activities in addition to those managed by Education New Zealand. The largest of these is the Office of the Code Administrator which is part of the Ministry of Education. The International Education Appeal Authority is also paid for by the Levy.

Levy collection and administration is undertaken by the Ministry of Education, and the cost of this is taken from the Levy. The Government also keeps Levy funds in reserve in part for indemnification purposes as allowed for the current legislation.

During 2005, the percentage of the Levy collected from each sector was as follows:

Levy collected by sector: 2005

Universities	= \$1,550,008
Polytechnics	= \$390,171
PTE's	= \$297,115
ELS	= \$371,510
Schools	= \$657,351
Other	= \$51,383
Total	= \$3,317,538

2. Advocacy

National Industry Advocacy gets support from the Levy by way of a core operating grant from the Ministry. This helps support Education New Zealand in our work to ensure that Government and other stakeholders are kept up to date with industry thinking, and to ensure that the industry viewpoint is well heard. Over the past year, Education New Zealand has continued to be very active in advocating across a wide range of industry issues.

With the formation of a new Government in October following last years elections, the Chairman and/or Chief Executive of Education New Zealand made the case for the industry at a significant number of high level meetings and forums through November and December.

Below is a small sample of Education New Zealand's active advocacy work on your behalf during 2005/06:

- Hon Dr Michael Cullen, Minister for Tertiary Education and International Education
- ENZ met the Minister shortly after his confirmation in the role, and gave him an extensive post-election briefing on the policy issues currently before the industry. Subsequent meetings with Dr Cullen and/or his advisers have been held
- Hon Goff and Hon Sutton: advising Ministers on New Zealand's strategy for the education services negotiations at the World Trade Organisation
- Other Ministers: ENZ presented its advocacy document, 'International Education Manifesto', to the Ministers of Immigration, Foreign Affairs, Trade and Trade Negotiations
- Opposition Spokespersons: Education New Zealand also presented its Manifesto to the various Opposition Spokespersons. A post-election briefing has been held with the Opposition
- Meetings and briefings with a number of international politicians, diplomats and officials, including from China, Chile, Turkey (including the Prime Minister), India, Canada, Japan, Australia, USA and the Middle East
- Governor General: discussing opportunities for expanding New Zealand's education export links with South East Asia, following her recent visit to the region
- The Reserve Bank: Education New Zealand is regularly consulted by senior economists in the Reserve Bank as it prepares its economic forecast
- Senior immigration policy officials from the Department of Labour: Education New Zealand maintains a regular dialogue with immigration officials on policy and operational matters impacting upon the industry
- Immigration legislation: ENZ has been proactive in making representations and submissions on the Licensing of Immigration Consultants and the Immigration Review
- Stakeholder agencies: ENZ make representations regularly to agencies such as NZQA and the TEC. Regular and frequent consultation and dialogue is undertaken with the Ministry of Education and New Zealand Trade and Enterprise

These are just a few examples of the advocacy functions of ENZ.

Industry Input and Communication

All the completed Levy funded reports are up on the Education New Zealand website at **www.educationnz.org.nz**

E-news is the major method of communication that we use to alert you to levy funded outcomes. It currently goes to nearly 2000 subscribers and is sent usually every fortnight (sometimes more frequently if there is urgent news, sometimes less if things are quieter). It is not the only method of consultation and dissemination though.

The Levy Reference groups are sector representative, and are the most direct conduit for industry consultation and representation. Members are selected by the sector bodies, and we call for their nominee each year. As much as possible, the philosophy of 'taxation equals representation' applies, and this is covered off via the sector representative approach which ensures a range of views across industry.

As well as these methods of communication, Education New Zealand staff are frequently 'on the road' both as part of the PACE programme and for other meetings and gatherings. Education New Zealand staff are also always accessible by e-mail or phone.

If you are not on the e-news list, please email **educationnz@educationnz.org.nz**

For a list of the members of the Levy Reference Groups, go to **www.educationnz.org.nz/eedf/groups.htm**

3. Research

The Research Reference Group commissions and reviews various research projects throughout the year. During 05/06 The Research Reference Group prioritised the completion of outstanding research – as a consequence there were a lower number of projects commissioned during the reporting year.

Over the past year the following research projects have been funded:

Project Code:	R08
Project Title:	Country/Region Demand Side Market Research – Japan & South Korea
Reference Group:	Research
Status:	Nearing completion – interim presentation at ENZ Conference

Summary of Project:

The key objectives of the project will be to undertake a mix of desk research and sample analysis of prospective international students through surveys and focus groups, to provide market research of relevance to New Zealand Education institutions and promotional agencies which will inform future marketing strategies, product supply and pricing decision in two key source countries (Korea and Japan).

Provider:	Strategy Policy and Research in Education Ltd
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Project Code:	R10
Project Title:	Dissemination of Research Reports
Reference Group:	Research
Status:	Underway
Estimated Finish Date:	30 August 2006

Summary of Project:

It has been recognised that there is a need for Research Reports, results and findings to be disseminated out to the wider industry. Currently research reports are only provided through notification in e-News and on the ENZ website. It is envisaged that ENZ will develop a dissemination and workshop work-plan to be implemented through out 2006.

Provider:	ENZ and Centre for Applied Cross Cultural Research, Victoria University
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Project Code:	R11
Project Title:	Stock-take of New Zealand Literature on Export Education (Update)
Reference Group:	Research
Status:	Complete

Summary of Project:

In 2004, Ministry of Education, under the Education Export Levy, commissioned a stock take of previous literature (NZIER 2004). The aim of this research was to provide an overview of the literature on export education in New Zealand that can act as a starting point for those considering doing on the topic.

A database of the literature was provided following research in an Excel spreadsheet that contains bibliographic details of over 350 articles related to the education export sector in New Zealand.

Two years on, it is felt that there is the need to update this database as further research has been published over the past two years.

Provider:	New Zealand Institute of Economic Research (NZIER)
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4. Capability Development

When the original Levy Reference Groups were set up, there were three Professional Development groups:

- English language;
- Tertiary; and
- Secondary.

At an early stage, it was recognised that there was considerable crossover between the groups. Last year Education New Zealand streamlined the PD groups into one committee (Capability Development) with cross-sectoral representation.

The Capability Development programme continues to be extensive and wide ranging. Below is a summary of activities:

Project Code:	CD01.1
Project Title:	Research into Good practice in institutional professional development within New Zealand
Reference Group:	Capability Development
Status:	Complete

Summary of Project:

The Objective of the project is to document good practice in Professional Development within state education institutions in New Zealand. The research will then guide the Professional Development Working Group as it develops future work programmes, and once published will also provide guidance for all educational institutions within New Zealand's education export industry.

The research will be cross sector and would look at a range of institutional policies and practices in all aspects of running an international education programme within an institution (eg: PD for recruitment, admission, orientation, financial management).

The Researcher(s) will gather information about good practice in professional development in New Zealand, with respect to running international education programmes, as perceived by New Zealand providers, and will cover the following specific areas of Professional Development:

- Organisational Goals;
- Staffing;
- Staff and Student Induction;
- Activities;
- Resources;
- Student evaluations;
- Perceived problems; and
- Copyright issues.

Provider: Vince Catherwood & Associates

Project Code: CD01.2
Project Title: Research into Good Practice in Institutional Professional Development within New Zealand (Private)
Reference Group: Capability Development
Status: Complete

Summary of Project:

The Objective of the project is to document good practice in Professional Development within private education institutions in New Zealand. The research will then guide the Professional Development Working Group as it develops future work programmes, and once published will also provide guidance for all educational institutions within New Zealand's education export industry.

The research will be cross sector and would look at a range of institutional policies and practices in all aspects of running an international education programme within an institution (eg: PD for recruitment, admission, orientation, financial management).

The Researcher(s) will gather information about good practice in professional development in New Zealand, with respect to running international education programmes, as perceived by New Zealand providers, and will cover the following specific areas of Professional Development:

- Organisational Goals;
- Staffing;
- Staff and Student Induction;
- Activities;
- Resources;
- Student evaluations;
- Perceived problems; and
- Copyright issues.

Provider: GBM & Associates

Project Code: CD02
Project Title: Examination and Analysis of Professional Development in other Export Education Countries.
Reference Group: Capability Development
Status: Complete

Summary of Project:

The objective of the project is to examine and analyse what's happening in other export education countries (eg; Australia, Canada, UK and USA) and other countries that the examiner(s) may think suitable, in the area of professional development. It is anticipated that the examination will guide the Professional Development Working Group as it develops future work programmes, and once published will also provide guidance for all educational institutions within New Zealand's education export industry.

The examination will be cross sector and will include Tertiary, Primary and Secondary Schools, Polytechnics, Private Training Establishments (PTE's) including English Language Schools. It is expected that as part of the methodology, the Provider will look at a range of institutional policies and practices in all aspects of running an international education programme within an offshore institution (eg: PD for recruitment, admissions, orientation, financial management).

Provider: GBM & Associates

Project Code: CD04
Project Title: Tertiary Admissions Workshops
Reference Group: Capability Development
Status: Complete

Summary of Project:

This project is the second round of workshops for Tertiary Admissions and Marketing Staff. This is a continuation of the T2 Admissions workshop project.

Provider: The Knowledge Partnership

Project Code: CD05
Project Title: Scoping Study: International Student tertiary admissions database for New Zealand.
Reference Group: Capability Development
Status: Underway
Estimated Finish Date: 21 August 2006

Summary of Project:

There is a critical need for a national database for guiding the processing of admissions both from:

- (a) international students coming via onshore/domestic pathways; and
- (b) international students coming via offshore pathways – country specific database.

The latter may provide a structured link between NZ and an existing database offshore.

Provider: The Knowledge Partnership

Project Code: CD06
Project Title: Homestay Selection and Monitoring Workshops
Reference Group: Capability Development
Status: Complete (First Stage)

Summary of Project:

The future of the Education Export Industry is reliant on the industry's ability to provide good quality, positive and supportive living environments for the international students. The environment in which a student lives can either assist or hinder the student's transition into the New Zealand education environment and their achievement of their education goals. The industry is becoming increasingly competitive so the need for good quality homes for students is essential.

Work has been conducted to provide accommodation and homestay providers with the skills to assist them to provide students with positive and supportive living environments. The next step is to develop selection and monitoring procedures to ensure that there are robust and sound procedures for assessing the suitability of a home stay to have a student for monitoring the home stay to ensure they are consistently meeting their obligations as a home stay provider. Developing and implementing selection procedures which will greatly increase change of them successfully providing a positive and supportive living environment. The monitoring procedures will provide the home stay provider with feedback and accountability, both of these have been

shown to be integral in the process of motivating and achieving high standards of performance (e.g. home stay service).

The first part of this project will be for the Contractor to provide a research and development report on issues around homestay monitoring and selection processes and a collection of best practice information. This report will form the basis for a workshop on homestay selection and monitoring which will be part of the 2006 2007 work programme.

Provider: CreationWorks/AFS Intercultural Programmes NZ

Project Code: CD07

Project Title: Regulatory Compliance – Legal Guidelines Workshop Presentations

Reference Group: Capability Development

Status: Complete

Summary of Project:

In 2004, Education New Zealand contracted Kensington Swan to develop legal guidelines for export education providers. The objective was to develop a resource for the legal representatives of export education providers outlining an institutions responsibilities and obligations. The responsibilities relate to immigration, NZQA, the Ministry of Education, the Fair Trading Act, the Consumer Guarantees Act, the Human Rights Act, the Code of Practice and most recent, the introduction of the industry levy. The resource was to build on the guidelines that were already developed by Education New Zealand. It was later identified that presentations needed to be run on the legal obligations and responsibilities of institutions and staff who are involved with international students. The workshop presentations are expected to achieve:

- Raising awareness of industry providers of availability of the Guidelines document
- An overview of what the Guidelines document contains
- Explanation of how the Guidelines document is intended to be used
- Answering questions from participants

The workshop presentation is not intended to be a "one stop shop" where participants could expect to have all their legal questions comprehensively answered; this is not the purpose of the Guidelines document. The purpose of the document is to raise awareness of all areas where export education providers have regulatory compliance requirements and the existing laws and regulation must be complied with. Where providers have specific legal issues or problems, they would need to seek advice of a lawyer on that specific legal problem.

Provider: Kensington Swan

Project Code: Q2

Project Title: Monitoring Academic Standards

Reference Group: Quality Assurance

Status: Complete

Summary of Project:

The project aims to develop and implement a process that will standardise selected Academic Managers from English New Zealand schools as Auditors who can carry out inspection visits of member schools. In conducting these visits, they will be ensuring that the recently developed Academic Standards are being adhered to. The project aims to create a Code of Conduct for these Auditors and establish an induction

Provider: ENGLISH NEW ZEALAND

Project Code: R08
Project Title: Country/Region Demand Side Market Research - Japan & South Korea
Reference Group: Research
Status: Currently underway

Summary of Project:

The key objectives of the project will be to undertake a mix of desk research and sample analysis of prospective international students through surveys and focus groups, to provide market research of relevance to New Zealand Education institutions and promotional agencies which will inform future marketing strategies, product supply and pricing decision in two key source countries (Korea and Japan).

Provider: Strategy Policy and Research in Education Ltd

Project Code: R10
Project Title: Dissemination of Research Reports
Reference Group: Research
Status: Underway
Estimated Finish Date: 30 August 2006

Summary of Project:

It has been recognised that there is a need for Research Reports, results and findings to be disseminated out to the wider industry. Currently research reports are only provided through notification in e-News and on the ENZ website. It is envisaged that ENZ will develop a dissemination and workshop work-plan to be implemented through out 2006.

Provider: ENZ and Centre for Applied Cross Cultural Research, Victoria University

Project Code: R11
Project Title: Stock-take of New Zealand Literature on Export Education (Update)
Reference Group: Research
Status: Complete

Summary of Project:

In 2004, Ministry of Education, under the Education Export Levy, commissioned a stock take of previous literature (NZIER 2004). The aim of this research was to provide an overview of the literature on export education in New Zealand that can act as a starting point for those considering doing on the topic.

A database of the literature was provided following research in an Excel spreadsheet that contains bibliographic details of over 350 articles related to the education export sector in New Zealand.

Two years on, it is felt that there is the need to update this database as further research has been published over the past two years.

Provider: New Zealand Institute of Economic Research (NZIER)

5. Generic Promotion

The process used for managing generic promotion money differs slightly from Research and PD. This is because the Government have put money prior to the levy into the development and support of the 'New Zealand Educated' Brand, and had developed an advisory structure to assist that process.

On behalf of the industry, Education New Zealand became custodian of the New Zealand Educated Brand in 2004. It was decided to retain the existing Promotions Reference Group (PRG) as the industry representative advisory group, and tweak its composition to ensure that industry representatives were the majority. Representatives from Tourism, MoE and NZTE also sit on the PRG. This in part reflects the crossover interest from each of their departments, and in part reflects that there is still Government funding outside the levy provide for generic promotion.

A work programme is approved by the PRG each financial year, and they determine priorities and directions including the overall allocations between output areas. The Government goes through a similar process to approve the government funded portion of the work plan. Functional spending is drawn down from a combination of levy and government funds with the source and ratio dependent on the output. Government funds may be tagged to specific outputs.

The overall programme is monitored by PRG and developed during the year depending on emerging opportunities and priorities

Overall funds available for a generic international education marketing programme between July 1st 2005 and June 30th 2006 were:

- Industry (Levy) funding – \$1,173,000 + GST
- Government funding – \$1,130,000 + GST

The Government funding included \$350,000 specifically for generic promotion in India, and \$30,000 for the development and production of a tertiary mini-disc.

Comprehensive information, including the full PRG Annual Plans, is on the ENZ website. This report summarises the outputs to which both Levy and/or Government funding was applied during 2005/06. Because some outputs utilise funding from both sources, they are all included for convenience.

Brand management

This output was carried out in accordance with the 2005/06 Plan, and delivered at the budgeted cost. The funds used were entirely from Government, and the allocation reflected the Governments prioritisation and usage of those funds.

Official Delegations

This Government funded output enables ENZ to represent and support industry across a range of activities, including participating in Ministerial missions and other events that have a pan-industry focus.

International Media Visits

Media visits are an important adjunct to more direct promotional activities. In line with the direction of PRG, media visits were hosted from Germany, the USA and Canada. In addition, a media component was added to an inbound agent visit from Thailand. ENZ also supported and cooperated with visits organised by NZTE and MFAT. The government funding of this output is in recognition of the fact that media visits do not by nature always have a specific institutional benefit, but act as part of the overall generic promotion.

Agent Support

Agents continue to be a vital component in attracting students to New Zealand. Unlike other countries, New Zealand does not have a generic offshore network that can carry out recruitment functions. We leverage this reality by supporting agents who can promote New Zealand secure in the knowledge that we do not actively compete with them in country.

We are mindful of the fact that the essential business relationship is between agent and institution. The generic role is as an adjunct and support to that, not a replacement of it.

Initiatives supported under this output included an independent evaluation of inbound agent visits, progress on generic communications and online support of agents and specific support of inbound initiatives such as the KOSA agents visit and the agent presence at the China Forum.

The first ENZ industry secondee has a specific mandate around improving the generic support and relationship management for agents. A new innovation was the formation of the New Zealand India Education Representatives group – the first formal Agents Association with an NZ focus.

Collateral production

Generic collateral development and production is an ongoing task. This includes general printed and disc based material available for prospective students, promotional 'giveaways' and banners and other signage for use at events and activities.

A digital 'platform' was developed initially around the Tertiary Education guide. This basic platform will be spun off to support similar material for other sectors going forward. We acknowledge the specific funding made available by Government that was the catalyst for this project.

Events Support

Both Events Support and Events Promotion built on the success of the Market Development output in the previous plan. With the downturn in the industry, and consequent pressure on institutional budgets, these outputs enabled 'New Zealand Inc' to maintain a good profile at many events around the world, rather than have a substantially diminished presence.

Events Support was primarily targeted at the events themselves, for example the generic 'NZ Inc' 'look and feel' in fairs in places as diverse as China, India, Brazil and Chile and also allowed for a potential underwrite at key selected events (e.g. China) where, to secure favourable pricing a space determination had to be made well in advance.

Event promotion was used to increase promotion at selected events, usually through a combination of a more comprehensive campaign over a longer period of time. New initiatives, such as the Japan Combined Tertiary Fair (in conjunction with Canada and Ireland) and the Taiwan Virtual Fair were also supported.

Sixty two separate events were supported during the year – all being events where there was an institutional presence.

Events Promotion

As above – Events Promotion was strongly linked to the Events Support output – the split output categorisation being primarily an administrative delineation.

Website Evolution

The online world does not stand still, so following on from the successful evolution of **www.newzealandeducated.com** in 2004 an independent audit and evaluation of the website was commissioned. Following a contested tender, Shift was selected for the task.

Their report was completed earlier in 2006, and makes a number of recommendations. The intention is to proceed as funding allows in implementing the recommendations following the further advancement of the brand evolution project, which will in part inform further website development. Accordingly, some unspent funds under this output are to be accrued through to the 2006/07 year.

Industry Website maintenance

This output is separated out for administrative convenience and relates to the hosting of the site.

Study in New Zealand Publications

The SINZ publications are the recognised 'NZ Inc' guides to New Zealand's international education opportunities. In past years there has been significant generic support for SINZ publications, recognising that they have significant generic content and a front line role in New Zealand's visibility.

For 2005/06, this support was lowered considerably. This reflected the reality that the SINZ publications should be 'stand alone' from a funding perspective. However, this has an implication for SINZ content, particularly the comprehensive institution listings and some front end generic promotion content, especially in 'Courses and Costs'. It can reasonably be argued that this content is not specific to the participating institutions. In recognition of this, funding was retained in the plan to allow for the inclusion of this content.

Funding was also directed at the 'SINZ digitalisation' project, which is developing an electronic framework (spinning off from the multi-media format development undertaken as part of the Collateral output) to allow the publications to be produced in minidisc format.

Brand Evolution

PRG approved an independent audit and evaluation of the 'NZEd' brand during 2005/06. Following a contestable process and pitches by 4 branding specialists, Brian R Richards Ltd (BRR) was selected to undertake the audit and evaluation.

This process was completed early in 2006, and BRR presented their findings to PRG. As a result of this presentation, PRG recommended that ENZ continue to engage BRR to further consult with industry and make recommendations around further brand development. The balance of funding available in the 2005/06 brand development output category was spent on this project. Due to some evolution in the next phase, there was a slight overspend in this particular output.

Industry Media Management/Communications

ENZ has continued on behalf of industry to ensure that industry positions are communicated to the media both proactively and in response to issues as they arise. The overall decline in the number of students has continued to interest the media, and considerable work has gone in to updating media commentators on overall trends and implications.

The year has also seen an unusually large number of reported incidents, such as the Wan Baio murder case, alleged student prostitution, controversy around student magazine publications and the overall experience of international students.

A large part of the communications role revolves around ensuring that media commentators have factual information enabling them to take a balanced view (which often results in a 'hot story' becoming in fact no story at all). Statistical updates and interpretation are provided both pro-actively and on demand as required. In particular, the impact of domestic stories on offshore media and opinion is communicated on an ongoing basis to the media.

Where relevant, the media are referred for substantive or additional comment to sector representatives. Sector and regional representatives are also given 'heads ups' of ENZ generated releases and/or the 'industry line' on specific issues.

Desk Research

This is a fully Government funded output that allows for the purchase of offshore research and relevant publications. This material is usually protected against copying by copywrite, but is catalogued and available at ENZ on request.

Advertorials

A modest advertorial programme places content and/or advertising in specific publications. The major initiative during the year was the Global Study Magazine advertorial, but NZ international start-up publication 'Discover Downunder' was supported, along with ad-hoc placement in journals such as the IIE Networker.

Industry Consultation

A new Government funded output for 2005/06; Industry Consultation encompassed both publications that communicate with industry (such as Levy reports) along with the running of specific industry advisory groups including the Commercial Development groups for South Asia and South East Asia, and the India operational group.

Generic Promotion in India

This was a new output added after the plan was agreed, and utilised a one-off specific fund of \$350,000 allocated by Government. This additional support allowed for the rollout of specific generic campaign including expanded promotion, a second Fair series, the development of an Agents group, agent training and other PR activities.

Conclusions from the 2005/06 Programme

As the above summary outlines, ENZ have delivered essentially the programme that PRG proposed and endorsed for 2005/06.

Whilst the current programme was tailored around the PRG requirements of the time, there is likely to be considerable evolution in the 2006/07 plan. This is not to invalidate the approach up to this time, but reflects both the evolving funding regime and also the evolution of PRG's own thinking and direction.

Overall this will inevitably lead to a change in the outputs for 06/07. As PRG has developed this new direction, existing outputs were re-examined during the current year towards either a sunset transition or modification towards new priorities. In particular, smooth transitions either towards or away from existing output classes were factored in to the latter stages of the programme.

6. Conclusion

Education New Zealand and its Reference Groups work hard to ensure that all available funds, no matter what source they come from, are efficiently and effectively deployed to support a balanced range of industry initiatives.

Levy funding continues to support a wide range of activity. Within the overall scope of the programme there are multiple outputs that are directly applicable to every sector.

Looking ahead, the 2006/07 Work Plans have been developed by Education New Zealand's Reference Groups. The Work Plans are currently being considered by Government and approval is expected in late August. As noted in the introduction, this Government process is needed because it is not actually Levy funds that are used – Government collects the Levy and makes separate appropriations to support the activities noted above – the amount based on a variety of factors including the amount of levy collected.

ENZ welcomes industry input into any aspect of the work programme, either via the industry representatives on the Reference Groups or direct to ENZ.



Notes





Education New Zealand
Level 6, 138 The Terrace
PO Box 10-500
Wellington
New Zealand

Telephone: + 64 4 4720788
Facsimile: + 64 4 4712828
Email: educationnz@educationnz.org.nz

Industry Website: www.educationnz.org.nz
Student Website: www.newzealandeducated.com