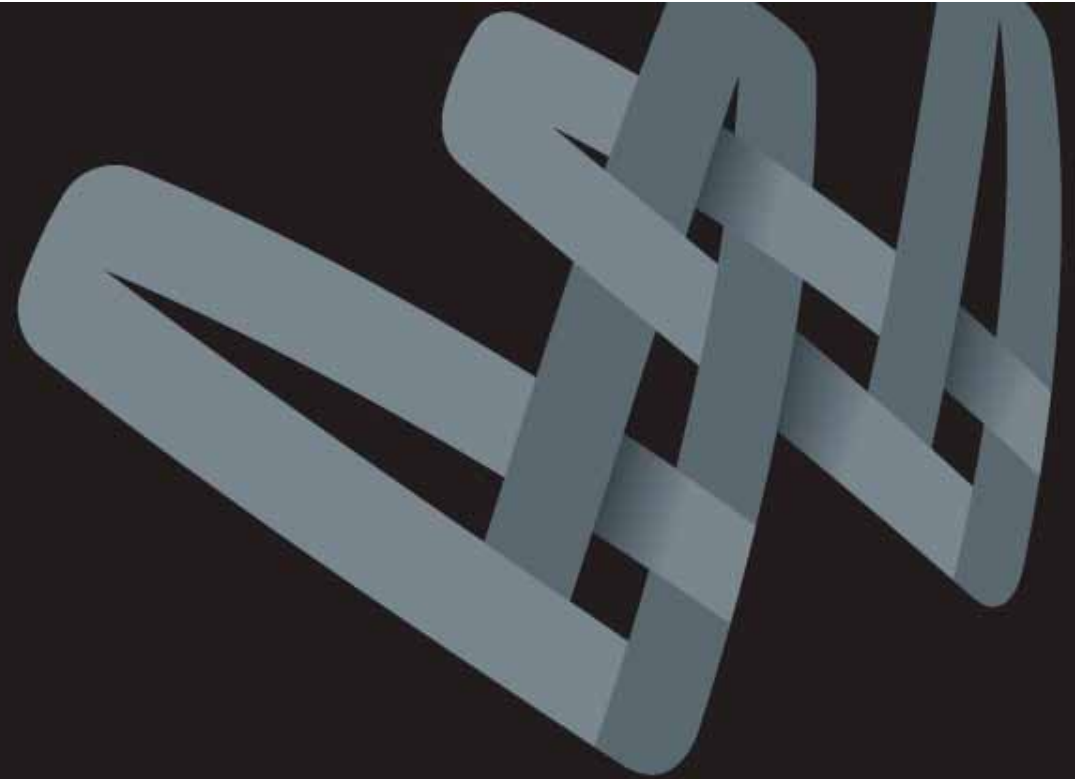




Whitireia
NEW ZEALAND



International Collaboration

Don Campbell

NZITP Conference

28 October 2011



www.whitireia.ac.nz | 0800 944 847

leading and illuminating
our communities through tertiary education™

EFTS by Country of Origin YTD October 2011

	EFTS	%
China	689	50%
Tonga	365	26%
India	113	8%
Saudi Arabia	90	7%
Sth Korea	20	2%
Philippines	18	1%
Vietnam	18	1%
Japan	18	1%
Nepal	10	1%
Other	42	3%
Total	1,383	100%

Proportion of total student visas 2010 for all providers

Visas 2010
22%
1%
12%
6%
16%
1%
2%
10%
*0%
30%
100%

•Less than 1%



International Fee Paying Students in NZ

	Total New Zealand	% Change	Whitireia	% Change
2007	92,502	-4.2%	641	+3.1%
2008	90,082	-2.6%	699	+9.0%
2009	95,524	+6.0%	821	+17.5%
2010	98,474	+3.1%	982	+19.6%
2011	103,500 [^]	+5.0% [^]	1383 [*]	+24.3% ^{**}

[^]Est for 2011

^{*}As at Oct 2011 including Pacific

^{**}Not including Pacific Oct 2011



Institutional Choice and Major Markets

2010	School	ITP	University	Private Providers	Other	
China	11%	14%	28%	43%	4%	100%
South Korea	35%	5%	8%	48%	4%	100%
India	1%	26%	11%	63%	0%	100%
Japan	18%	7%	10%	57%	6%	100%
Saudi Arabia	4%	7%	23%	57%	8%	100%
Other Countries	18%	10%	25%	44%	3%	100%
TOTAL	16%	12%	20%	49%	4%	100%

Total NZ students by location

	2009	2010
Auckland	58.5	57.8
Canterbury	15.0	15.3
Waikato	5.4	5.6
Wellington	5.3	5.4
Otago	5.0	4.9
BOP	2.7	2.8
Manawatu	2.5	2.4
Taranaki	1.5	1.3
Other	4.1	5.5
Total	100%	100%



Our Strategic approach :

Positioning of Whitireia New Zealand as a leader in Technical and Vocational Education and Training (TVET) and to focus on:

- Partnerships not just open market
 - On-shore as well as off-shore partnership emphasis
 - International development not local competition
- Product and country differentiation
 - Partners
 - Delivery modes and location
 - Contract and IP marketing opportunities
 - Capacity building and knowledge transfer.

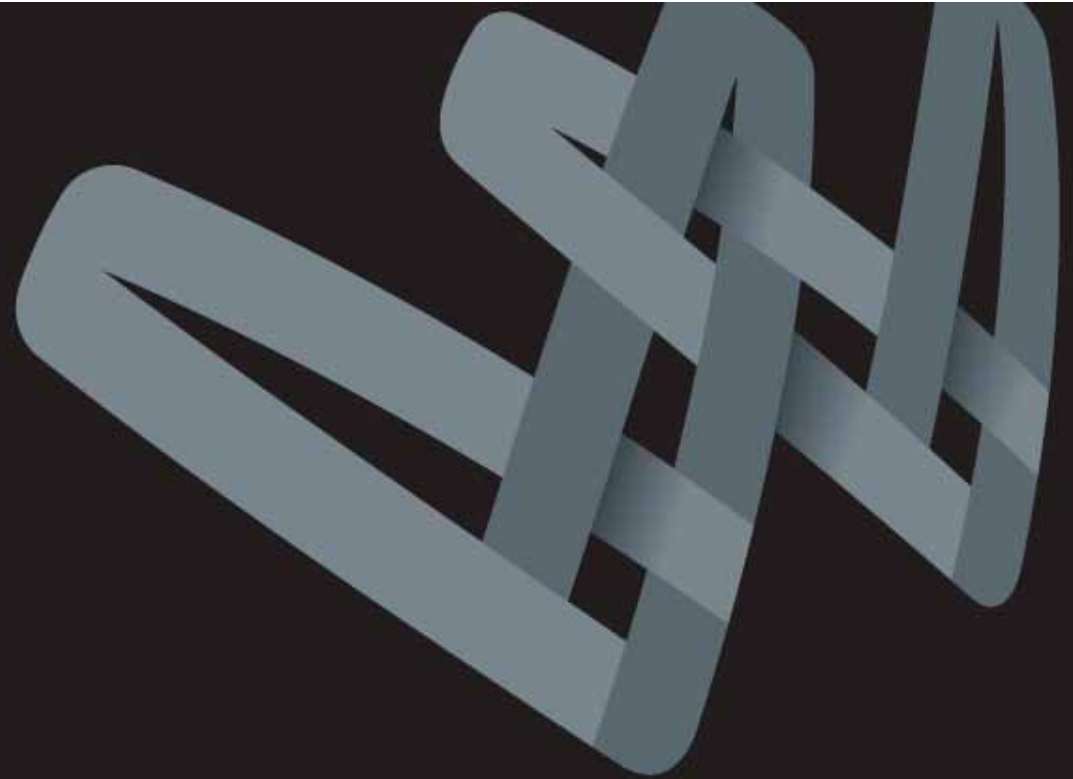


Partnerships and Articulations

- Off-shore partnerships (mostly institutions)
 - China
 - India
 - South Korea
 - Japan
 - Tonga
- On-shore partnerships
 - Students First
 - Other ITPs
 - PTEs



Whitireia
NEW ZEALAND



Challenges in the Current Environment



www.whitireia.ac.nz | 0800 944 847

leading and illuminating
our communities through tertiary education™

Volatile Market

- Major US Universities moving to offer commissions to agents
- Immigration changes impacting NZ attractiveness
- McKay model extended to TAFES in Australia - fast track visa for recognised providers
- New Zealand Dollar strength
- New provider countries (Singapore/Philippines)



Capped Domestic Environment Impact on the International Market

- Little focus or commitment to NZ Inc
- Increased ITP Competition eg in Auckland
- PTEs struggling for sustainability
- Institutions offering 25 -30% commission
- Institutions offering increased cross credit flexibility



Government goals

“Doubling the economic value of international education to New Zealand is at the heart of the Government’s Leadership Statement for international education”, Tertiary Education Minister Steven Joyce.

Includes targets to:

- increase annual revenues from providing education services offshore to at least \$0.5 billion
- develop and sustain mutually beneficial education relationships with key partner countries in Asia, the Pacific, the Middle East, Europe and the Americas
- increase the number of international students enrolled in New Zealand providers offshore, from 3,000 to 10,000
- double the number of international postgraduate students (particularly in programmes in addition to those at PhD level) from 10,000 to 20,000
- increase the transition rate from study to residence for international university students
- increase New Zealanders’ skills and knowledge to operate effectively across cultures.”

Steven Joyce 20 September 2011

The Challenges and Opportunities

- ITP share of the overall cake is too low?
- Much greater collaboration needed to grow a bigger cake
- Diversify through partnerships
- What should a strong NZ Inc. look like?
- The strength of the NZ TVET brand?
- Wellington underperformance
- Wellington Inc through Students First



The Future for Whitireia New Zealand

- Continued expansion of inbound student numbers with growth from new markets (Middle East, Indonesia) ahead of the industry average.
- A wide range of products and pathways will be offered through cooperative agreements with PTEs and other providers.
- Offshore delivery through e-learning platforms and partner institutions will offer both blended delivery and full qualifications.
- Contracts and offshore delivery will account for 25% of revenue
- International capability building/knowledge transfer.
- Wellington City will develop as an international hub for the Wellington region.





NZITP

Vocational education for prosperity

Conference 2011

Vocational Education for Productivity and Economic Growth

T R I B A L

