



# Application for exception to the Annual Maximum Fee Movement (AMFM)

## How to prepare your application

Please read the **application guidelines** carefully before completing this template. The guidelines, financial data template and further information on exceptions to the Annual Maximum Fee Movement (AMFM) are available on our website at [Annual Maximum Fee Movement](#).

### There are two parts to this application

- › **Part one:** Organisation information and declaration
- › **Part two:** Exception criteria

#### Key information

- › The AMFM rate for **2027 is 6.00 percent**. You may apply for an exception to increase course fees by **up to an additional 6.00 percent above this limit**.
  - › There is a limit to the number of courses you can apply for an exception for, based on the number of Equivalent Full-Time Students (EFTS).
- › Applications must be submitted by **5.00pm, 27 November 2026**.
- › The **chartered accountant's attestation** must be sent separately, directly to the Tertiary Education Commission (TEC).

#### Financial data template

Complete the financial data template alongside this form. List all course codes that are part of your application, along with the requested course fee cost. To download the financial data template and for further information on how to complete your application, see the [How to apply for an exception to the AMFM](#) section of the AMFM webpage, where you will find all application documents and guidance.

#### Requesting courses for an exception

The number of courses you can request an exception for depends on the number of equivalent full-time students (EFTS) enrolled.

- › Fewer than 1,000 EFTS = 4 courses
- › 1,000–4,999 EFTS = 8 courses
- › 5,000–9,999 EFTS = 12 courses
- › 10,000+ EFTS = 16 courses (plus 4 for every additional 10,000 EFTS).

## How we will assess your application

Your application will be assessed against the following AMFM exception criteria:

- › **Criterion one:** Financial sustainability (must be met)
- › **Criterion two:** Alignment to the 75th percentile (must be met).

It must also meet two of the following three criteria:

- › **Criterion three:** Completion rate meets or exceeds the sector rate
- › **Criterion four:** The course is in some way unique or special
- › **Criterion five:** Alignment to government priorities.

The application guidelines provide detail on what information we expect to see in your application and how we will assess it against the criteria. You are responsible for providing the information we request and any further information you consider appropriate to support your application.

We may consider information that is not in your application, and we may seek to verify anything in your application.

## How to submit your application

Email this application template, the financial data template and any other relevant supporting information to our Customer Contact Team at [customerservice@tec.govt.nz](mailto:customerservice@tec.govt.nz) with the subject line **[EDUMIS] – 2027 AMFM exception application**.

**Lead contact details:** *This is the person we will contact for more information if required. This person will also receive the outcome notification.*

1.4 Name:

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1.5 Role or position in the organisation:

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1.6 Phone:

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1.7 Mobile:

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1.8 Email:

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1.9 Outcome notification email addresses:

*Please list all emails you would like to receive notification of the outcome.*

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Please also ensure that your chartered accountant has forwarded the attestation form directly to us.

## Part one: Organisation information and declaration

### Organisation details

1.1 Legal name:

1.2. EDUMIS number:

1.3 Trading name (if applicable):

**Declaration:** *For tertiary education institutions (TEIs), the application must be authorised and signed by a delegated authority of the TEI's Council. For private training establishments (PTEs), the application must be authorised and signed by the Chief Executive or Board Chair.*

**I declare that to the best of my knowledge the information given in this application is true and correct.**

Signature:

Name and position:

Date:

## Part two: Exception criteria

Please provide written responses for each of the questions below, as well as information relating to criteria one, two and three in the financial data template that you submit alongside this application.

### Criterion one: Financial sustainability

*You can show the course is financially unsustainable, considering delivery costs, total income (including government funding and tuition fees), and a lack of viable cost saving alternatives.*

We require detailed information regarding the specific courses for which you are seeking an AMFM exception, as well as your overall financial position. **Please provide this information in the financial data template.**

Please provide the following, at the level of the course or qualification, department, division or tertiary education organisation (TEO), whichever is appropriate for the application.

|                                                                               |  |
|-------------------------------------------------------------------------------|--|
| Why costs are unsustainable without a fee increase.                           |  |
| Current fees charged for similar courses by your organisation and other TEOs, |  |

|                                                              |  |
|--------------------------------------------------------------|--|
| and an explanation for any significant difference.           |  |
| Financial impact with and without the proposed fee increase. |  |
| Impact of not running the course at all.                     |  |

### Criterion two: Alignment to the 75th percentile

*The existing fees for the course are no more than the 75th percentile of the range of fees charged for similar courses.*

Provide the information on your fees in the **financial data template** and ensure the fees for the course are **no more than the 75th percentile** for the range of fees charged for the same or similar courses (see application and assessment information).

### Criterion three: Completion rate meets or exceeds the sector rate

*If the course is part of a previously delivered programme at Levels 3 to 7 (non-degree) or 7 to 10 on the New Zealand Qualifications and Credentials Framework (NZQCF), its cohort-based qualification completion rate must meet or exceed the previous year's median performance benchmark for that NZQCF level.*

Provide the information that responds to **criterion three** in the **Completion rate workbook** in the **financial data template**, referencing 2025 sector benchmark scores (see application and assessment information).

### Criterion four: The course is in some way unique or special

*You can demonstrate that the course is in some way unique or special, for example, that there are no or very few similar courses to compare fees with.*

|                                                                                                                         |  |
|-------------------------------------------------------------------------------------------------------------------------|--|
| What is unique or special about the course?                                                                             |  |
| Provide evidence of the uniqueness or scarcity of national or alternative regional provision (you can attach evidence). |  |
| What is the evidence that the course is required by local employers and other stakeholders?                             |  |
| What will be the likely impact on stakeholders if the course can no longer be offered?                                  |  |
| What alternatives are there if this course can no longer be offered?                                                    |  |

### Criterion five: Alignment to government priorities

*Not allowing an exception will prevent you from making a significant contribution to the achievement of one or more of the government's priorities, as set out in the [Tertiary Education Strategy](#).*

|                                                                  |  |
|------------------------------------------------------------------|--|
| How is the course aligned to the government's priorities, as set |  |
|------------------------------------------------------------------|--|

|                                                                                                                                         |  |
|-----------------------------------------------------------------------------------------------------------------------------------------|--|
| out in the Tertiary Education Strategy (TES)?                                                                                           |  |
| To what extent, and why, would your ability to contribute to the priorities of the TES be affected if an AMFM exception is not granted? |  |

## Checklist

| Required information                                                 | Included in application (Y/N) |
|----------------------------------------------------------------------|-------------------------------|
| Completed application template.                                      |                               |
| Completed financial attestation template.                            |                               |
| All supporting information attached.                                 |                               |
| Chartered accountant attestation requested and sent directly to TEC. |                               |