



Plan Guidance

For providers submitting Investment
Plans for funding from 1 January
2027

**Tertiary Education
Commission**
Te Amorangi Mātauranga Matua



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Chief Executive's foreword

Investment planning for 2027 is taking place in a very challenging fiscal environment.

Demand across the tertiary education and training system remains strong. Funding is unlikely to match demand. Providers are also embedding the new vocational education and training system, while expectations around performance, outcomes and value for money continue to increase.

The Government is clear about its priorities – a strong focus on economic growth and productivity, better outcomes for learners, and careful management of public spending.

The new Tertiary Education Strategy sets this direction. The Tertiary Education Commission's (TEC's) role is to give effect to it through disciplined investment decisions that support New Zealand's long-term needs. Providers play a critical role in delivering this direction through their programmes and courses, and their outcomes and performance.

The investment environment is not expected to be materially different from 2026. Enrolments will likely exceed the funding available. Trade-offs will be required, and most providers will see reduced investment. No provider should assume 2026 funding levels will continue.

In making these decisions, we will focus funding on education provision that aligns with Government and TEC priorities, responds to the needs of employers and communities, and demonstrates strong outcomes for learners. Performance matters. Evidence matters. Improving educational outcomes for New Zealanders matters. Our appetite for risk remains low, and we will be actively reducing investment, especially when outcomes are poor, and programmes are not delivering on our priorities.

Across the tertiary sector, we need to see sustained improvement in educational performance. There are areas of good practice, but outcomes are not yet consistent across providers or across all groups of learners. For 2027, we expect to see ongoing improvement becoming more common across the system.

Plan Guidance 2027 sets out our expectations for this investment round and how Investment Plans will be assessed. With funding being significantly constrained, it is imperative that you use it to guide your planning and make clear choices about what you will deliver. Show in your Plan how you will respond to the Tertiary Education Strategy, lift performance and improve outcomes for learners in a constrained funding environment.

We welcome your comments on our planning and reporting requirements. We have simplified our Plan requirements to make it easier to provide updates on your approach to learner success. This is part of our ongoing work to reduce areas of compliance.

I encourage you to engage early with your TEC Relationship Manager or our Customer Contact Team. Early and open conversations will help us understand your goals, your challenges, and how your proposed delivery aligns with Government and TEC priorities, particularly where difficult choices are required.

I look forward to continuing to work with you. Together, we can deliver tertiary education and training that makes a clear difference for learners, while meeting the needs of employers and communities, supporting New Zealand's economic and social wellbeing.

Tim Fowler
Chief Executive

This Plan Guidance supports your planning for funding from 2027

A good Investment Plan is crucial given we expect total funding to be unable to meet the increase in demand in 2027

High levels of demand are forecast for 2027, and funding is not expected to match that demand. We will be actively reducing investment, especially when outcomes are poor, and programmes are not delivering on our priorities. A good Investment Plan is critical in this environment. You should ensure your Plan prioritises high-performing provision that aligns with Government and our priorities.

Plan Guidance explains our investment approach and expectations of Investment Plans (Plans) for funding in 2027. It describes the outcomes we want from our investment in tertiary education in relation to the new Tertiary Education Strategy 2025–2030 (TES) and across higher, vocational and foundation education. Importantly, it outlines what we need to see in your Plan and how we will assess that information.

A good Plan should:

- › give us confidence in your organisational capability to deliver on the TES
- › show the value that your organisation adds in the tertiary network, and
- › indicate how you measure and will improve your performance over time.

Plan Guidance covers all Plan components and is relevant regardless of whether you must submit a full Plan or just some components. Plan Guidance is also relevant when developing Significant Plan Amendment or Replacement Plan applications, submitted during the 2027 funding year.

Your proposed Plan should cover a three-year planning horizon and give us confidence in what you intend to do over your proposed Plan period. Refer to what you have achieved over the period of your current approved Plan (if you have one) and how you are using any lessons learned to inform what you will do during this Plan period.

Your Plan should:

- › **set out your strategic intent and explain any significant planned changes to your mission over the period of your Plan**
- › **describe how your organisation will give effect to the [Tertiary Education Strategy 2025–2030 \(PDF 1.3 MB\)](#)**
- › **describe your specific role in and contribution to tertiary education and training, particularly any proposed changes**
- › **show how you are addressing, and/or will address, the needs of your learners and other stakeholders**
- › **describe how you are taking a whole-of-organisation approach to improving outcomes for all learners**
- › **describe the activities and programmes you will carry out over the period of your Plan, including where these differ significantly from your previous Plan, and**

- › **detail your performance outcomes over your previous Plan period, and describe how you will measure and improve your performance over your proposed Plan period.**

Your Plan is a critical public accountability document for your learners, communities, stakeholders and us.

See *Plan components*, pp. 43–52, for detailed information.

Engage with us early for effective planning

Early engagement with us helps you understand where we want to invest and what we want to invest in. It helps us to provide advice and support to you more effectively when developing your Plan, particularly in a very tight fiscal environment. If you have a Relationship Manager, they will provide ongoing advice and up-to-date information as part of our engagement process starting in March 2026.

We are operating in a highly constrained funding environment, therefore we cannot guarantee you will receive funding at the same level as you received for 2026, or any funding for new initiatives.

We expect you to discuss any changes you propose to make before you submit your Plan, including but not limited to:

- › any new areas of provision you are planning to enter since your last Plan, or intend to enter
- › your regional breakdown of provision, how this has changed since your last Plan and what changes you intend to make over this Plan period, and
- › your provision of investment priorities, how they have changed since your last Plan and what changes you intend to make during this Plan period.

Any significant changes should be included in your Plan.

We will have to prioritise funding and this information will guide our decisions.

Refer to key resources as you develop your Plan

You should familiarise yourself with these resources, which explain various elements of the Investment Plan process and how we make decisions.

Key resources to refer to as you develop your Plan

- › The [Tertiary Education Strategy 2025–2030 \(PDF 1.3 MB\)](#): sets out the Government’s strategic vision for New Zealand’s tertiary system and its current and medium-term priorities. We have set out our expectations on pp. 17–19.
- › The [New Zealand Gazette notice \(Proposed Investment Plans for 2027: Content and Submission; Assessment Criteria; and Plan Summaries\) \(Plan Gazette\)](#): the legal instrument where the Tertiary Education Commission (TEC) sets requirements for the content of Investment Plans, Plan summaries, the submission process, the timetable, and the criteria against which proposed Plans are assessed.
- › This **Plan Guidance**: expands on the *Plan Gazette* notice, providing information on the wider strategic context for investment, and specific details about Plan requirements, our investment priorities and our assessment approach.

- › The [Strategic Intent template](#): provides a framework to help you meet the requirements set out in the *Plan Gazette* and Plan Guidance. **We strongly recommend that you use the template to structure your Plan.** This will enable you to tell your organisation's story in the most effective way and supports us to better assess your Plan.
- › **Supplementary Plan Guidance**: will be published in June 2026. It will provide further details following Budget 2026, and any extra information relevant to investment for 2027, including whether you will be able to apply for additional funding.

Resources that support you as you develop your Plan

- › Our [Learner Success approach](#)
- › Our [2026 Funding Conditions Catalogue \(PDF 3.5 MB\)](#)
- › The [Māori Education Strategy: Ka Hikitia](#)
- › The [Māori Language in Education Strategy: Tau Mai Te Reo](#)
- › The [Action Plan for Pacific Education](#)
- › DXP Ngā Kete data and information, including:
 - › the Secondary-Tertiary Transitions app on DXP Ngā Kete
 - › the Post-Study Outcomes app on DXP Ngā Kete
- › [Our Transitions from Secondary School research](#)
- › [Our previous work on the Transition to Tertiary Life \(PDF 1.7 MB\)](#)

Resources to help you understand how our investment processes work

- › [Introduction to the TEC's investment process](#): describes TEC's investment process
- › [Our Investment Framework for Learner \(Delivery\) Funds](#): describes the way we make investment decisions
- › [Our Response Framework for Educational Delivery and Performance](#): describes how we manage performance where it needs to improve
- › Information on [Significant Plan Amendments and Replacement Plans](#)

You must submit information to us by the due date

You must meet the Plan submission deadline. If we do not receive all required components of your Plan on time, this may delay your funding or make you ineligible for funding.

Activity	Timing
TEC publishes a notice in the <i>New Zealand Gazette</i> setting out requirements for Plan content, timetable, assessment and Plan summaries	16 March 2026
TEC releases Plan Guidance and Strategic Intent template; Plan engagement begins	16 March 2026
Government announces Budget 2026	28 May 2026
TEC provides indicative allocations	From 2 June 2026
TEC releases Mix(es) of Provision and Educational Performance Indicator Commitments templates	From 8 June 2026
TEC releases Supplementary Plan Guidance to reflect any policy or Budget changes	June 2026
Providers submit proposed Plans	By 3 July 2026
TEC reviews proposed Plans (including further discussion with providers as needed)	July–October 2026
Providers are notified of decisions in writing	From November 2026
First payments made against Plans; Plan delivery begins	January 2027

Timeline for new provider applications

There is a different timeline in place for new providers. See *New provider applications will be limited*, pp. 48–49, for detailed information.

Submit Plan components through DXP Ngā Kete

All required components of your Plan must be submitted by **3 July 2026** via DXP Ngā Kete. This includes your Strategic Intent, Mix(es) of Provision (MoPs) and Educational Performance Indicator Commitments (EPICs), as required.

Incomplete or missing Plan components may delay your funding approval and can affect whether you are allocated funding. TEC reserves the right to base investment decisions on the information available by the relevant due dates and can propose to decline funding if you have not submitted correct or adequate information by the due date.

Plan component requirements are described on pp. 43–52 of this Plan Guidance. If you are unsure about what you need to submit, we encourage you to contact your Relationship Manager, or phone us on 0800 601 301, or email customerservice@tec.govt.nz.

If you are a new provider applicant that has been approved to submit a proposed Plan and do not have access to DXP Ngā Kete, please email your documents to customerservice@tec.govt.nz with the subject line “[Name of Provider] – New Provider Application for 2027 Funding”.

2027 Significant Plan Amendments and Replacement Plans

You might want to make changes to your approved Plan during the 2027 funding year. We have threshold criteria in place which allow you to make some changes without our approval but for others you will need to do a Significant Plan Amendment or a Replacement Plan.

For more information see: [Significant Plan Amendments and Replacement Plans](#)



The tertiary education sector faces challenges, changes and opportunities

Plan Guidance for investment from 2027 is published during a time of significant change, challenge and opportunity for the tertiary sector, both in the immediate and longer term.

The new Tertiary Education Strategy will underpin investment

A major change is the new [Tertiary Education Strategy 2025–2030 \(TES\) \(PDF 1.3 MB\)](#), which informs the Tertiary Education Commission’s (TEC’s) investment decisions. The TES sets out the Government’s long-term strategic direction for tertiary education in New Zealand. It highlights some of the challenges and transformative trends that government and tertiary providers need to respond to in order to support economic growth and broader national goals. These are the:

- › transformation of society and the economy due to rapid technological change
- › evolving expectations and career patterns of learners
- › trade-offs and prioritisation required during a time of fiscal constraint
- › influence of global trends and pressures on tertiary education, and
- › demographic change that is reshaping New Zealand’s workforce to be older and more diverse.

Responding to the changes in the wider strategic environment and the priorities set out in the TES will underpin our investment decisions for 2027. We expect your Plan to show how you will give effect to the TES and give us confidence that you will contribute to achieving its objectives and priorities over time.

Within the framework of the TES the Government wants to see the tertiary education sector focused on:

- › improving learner achievement and accessibility, including ease of credit recognition and transfer across providers
- › building collaboration with stakeholders, with universities working closely together and with public research organisations (PROs)
- › embracing artificial intelligence (AI) in programme development, research and teaching (in a way equivalent to the [Public Service AI framework](#))
- › research that generates economic outcomes through innovation, commercialisation and entrepreneurship, and
- › growing its international reputation and attracting international students.

Tertiary education organisations need to have a credible and sustainable financial plan in place, and should utilise the advances in technological tools and systems that are increasingly available to lift productivity and enhance organisational efficiency.

We do not expect to be able to fund all demand in 2027

Our investment for 2027 will require trade-offs and careful prioritisation to maximise the value of public investment for learners, communities and the economy. You should not expect to receive the same level of funding you received in 2026.

As usual, we will not make funding decisions for 2027 on the basis of increased demand or delivery of priority provision alone. We will consider your:

- › demonstrated commitment to, and evidence of, improved learner achievement across all population groups
- › contribution to the network of tertiary provision in the context of the Government's priorities
- › organisational capability, performance and future expectations, and
- › financial performance and sustainability.

We expect to actively disinvest where these requirements are not met.

Significant structural change is under way in the VET sector

Vocational education and training (VET) is a vital part of our education and training environment. A well performing, responsive VET sector ensures industry has the skilled people it needs, and supports regional economies, productivity growth, and thriving individuals and communities.

The VET sector is transitioning to include regionally governed polytechnics and industry-informed Industry Skills Boards (ISBs). The two-year transitional period for work-based training arrangements is under way, and a new network of work-based learning (WBL) providers will soon be established.

Polytechnics support a regionally responsive system that reflects the needs of local communities and industries

Ten stand-alone polytechnics were formally established on 2 December 2025 and began operating on 1 January 2026. The Government will decide on the future of the polytechnics remaining within the New Zealand Institute of Skills and Technology (NZIST) in early 2026.

Industry Skills Boards give industry a strong voice in shaping vocational education

The eight ISBs established on 1 January 2026 will set and maintain qualifications, credentials and standards, endorse programmes, advise on workforce development priorities, and strengthen collaboration between education and industry. During the transition from NZIST to a new WBL system, ISBs will also temporarily manage some WBL.

Work-based learning is transitioning to a new model during 2026 and 2027

Between 2026 and the end of 2027 the remaining seven WBL entities will move out of ISBs into new or existing providers.

Private training establishments (PTEs) that currently deliver WBL will continue to do so under the new WBL system.

This is a significant and complex change programme and TEC will continue to focus on supporting the VET sector during this transition. For regularly updated information on the changes, see [Work-based learning changes from 2026](#).

Industry-informed network of work-based learning

During 2026 TEC will engage with employers, ISBs and industry groups to understand the network of WBL they want for their sectors.

We will look to implement any changes (including additional WBL providers and/or expansion of current providers' range of provision) after industry has given us a clear picture of the network of WBL provision that they want.

We need to lift achievement across the tertiary sector

Achieving sector-wide improvements in educational outcomes for all learners is central to the Tertiary Education Strategy and TEC's investment approach. While the tertiary sector performs adequately at an aggregate level, there are persistent disparities in achievement between providers, types of provision, and population groups.

Lifting the achievement of under-served learners is critical to meeting New Zealand's future skills needs. It will create significant returns for individuals, industry and the economy, communities, iwi, and society. We expect yearly improvements to be demonstrated by providers that are below specified performance rates. Providers currently above these rates should at least maintain them. Our performance expectations on pp. 29–34 clarify what **good** looks like.

There is strong evidence that developing and implementing a learner success approach that is consistent with our Learner Success Framework and the [Kia Ōrite Toolkit](#) delivers positive results for learners. Providers benefit financially and reputationally from improved learner outcomes. The learner success approach is a key tool for supporting you to respond to the *Achievement* and *Access and Participation* priorities in the new Tertiary Education Strategy.

We want to be confident that providers have an evidence-based, whole-of-organisation approach to improving learner achievement. This includes demonstrating an understanding of the factors influencing people's educational access and success. We use our performance and investment levers where positive shifts are not occurring at the rate or scale we expect.

The Tertiary Research Excellence Fund will be implemented from 2028

A simplified Tertiary Research Excellence Fund (TREF) will replace the Performance-Based Research Fund (PBRF), rewarding impactful research. The TREF is part of the Government's response to the University Advisory Group. It complements other changes including the goals of the new TES and the establishment of the University Strategy Group, public research organisations (PROs) and the Prime Minister's Science, Innovation and Technology Council.

Work is currently under way to design the TREF, and changes arising from this will be implemented for investment in 2028. However, some initial changes take effect from the 2027 investment year:

- › Weightings applied to the different reporting categories of external research income (ERI) will be altered to reward user-funded research more strongly.
- › A strengthened research component will be introduced to Plans. This will help you communicate how you are responding to the science and research system changes. All providers that receive PBRF funding need to complete the

strengthened research component for 2027 investment. This information can be submitted in the Strategic Intent template. If you are not required to submit a Strategic Intent for 2027, your Relationship Manager or Relationship Advisor will work with you to support the submission of this information through the [Research Activities for investment in 2027 template](#).

See *Plan components*, pp. 46–47, for information on the research component of Plans.

A new tertiary quality assurance framework is in place

The New Zealand Qualifications Authority's (NZQA's) integrated Quality Assurance Framework (iQAF) is now in place. iQAF replaces NZQA's evaluative Quality Assurance Framework, which used External Evaluation and Review (EER). TEC will continue to use current EER ratings, alongside iQAF and any other NZQA quality assurance information, for 2027 investment.



Delivering on the priorities in the new Tertiary Education Strategy underpins our investment approach

The [Tertiary Education Strategy 2025–2030 \(TES\) \(PDF 1.3 MB\)](#) focuses on ensuring a strong tertiary education system that supports an innovative, prosperous and educated New Zealand. It highlights the tertiary education system’s contribution to broader national goals and sets out the Government’s current and medium-term priorities to achieve this.

Your proposed Plan must set out how you will give effect to the TES and give us confidence you will contribute to achieving its objectives and priorities

Our expectations for implementing the five priorities of the TES are outlined below. For further guidance to support you to respond to the TES in your Plan, see the Strategic Intent template.

Priority 1: Achievement

Improving achievement in tertiary education is critical – success in gaining skills and completing qualifications leads to better overall outcomes for learners, the economy and society. However, our tertiary system faces persistent challenges in achievement. Completion rates remain uneven across providers, types of provision and population groups. Māori, Pacific peoples and learners with disabilities are more likely to leave tertiary education without completing a qualification.

We expect you to identify and apply evidence-based approaches to learner success appropriate to your learner cohorts and educational settings. Where you already have learner success approaches in place, we want to:

- › see evidence of actions you are taking to achieve tangible milestones, and
- › know how you are responding to areas for improvements to achieve this priority.

Where you are developing your approach, we want to see a commitment from your governing body to an approach consistent with the Learner Success Framework. You should be undertaking activities that will meaningfully progress your approach and improve learner outcomes.

Priority 2: Economic Impact and Innovation

Increasing the economic impact of tertiary education is about delivering relevant, adaptable skills as well as research that generates tangible impacts through innovation, commercialisation and entrepreneurship.

We expect you to describe how you are delivering relevant, adaptable skills that respond to workforce needs (industry, regional and other stakeholders) and increasing technological advances.

Where relevant, we expect your Plan to outline how your research activity will deliver greater economic value by focusing more clearly on national priorities, building stronger partnerships with industry, and strengthening the link between research and its application for economic value.

As Industry Skills Boards mature and provide insights and publications relevant to their sectors, we will expect providers delivering vocational education and training to be guided by this information.

Priority 3: Access and Participation

Ensuring people access and participate in tertiary education is essential to building a more productive, equitable and inclusive economy. However, some New Zealanders are missing out on the opportunity to develop their skills and contribute fully to the economy and society.

We expect you to describe how you are improving access to education and training for people from all backgrounds, including Māori, Pacific peoples, learners with disabilities, and those from low-income backgrounds.

Access to quality career information is critical to understanding different pathways and making well-informed decisions. Partnerships between secondary schools and tertiary providers can help bridge the gap for school students across the spectrum, from those at risk of not being in education to those looking to progress to higher education.

We are interested in how you are supporting learners to make learning relevant to work and understand what career pathways different qualifications lead to.

[Tahatū Career Navigator](#) can support your learners to explore career pathways.

We expect you to design programmes that support learners to access and participate in education. Flexible study options, transparent policies on credit recognition and transfer, clear pathways and access to relevant local training that reflects regional economies are critical.

Priority 4: Integration and Collaboration

Collaboration and partnerships with relevant stakeholders are essential to delivering better outcomes for individuals, the economy and Māori development aspirations. Collaboration between universities (in particular), industry, and public research organisations in the science, innovation and technology system is vital for growing New Zealand's economy.

Integration focuses on how tertiary education stakeholders can work in partnership with others to create more effective actions or processes. Stronger integration enables the system to align more effectively when partnerships and collaborative approaches are more deliberate, structured and outcome-focused.

We expect your Plan to outline how you will deepen collaboration with stakeholders relevant to your mission and role. Your provision and research activity should align with and support regional and national economic development. Integration should reflect the unique role of your organisation.

Priority 5: International Education

Providers need to ensure growth in international education is sustainable, and that the quality of education and educational experience for international students and domestic learners is maintained or enhanced. This will support New Zealand's reputation as a competitive global provider of high-quality education. Like domestic learners, international students expect more flexible, digitally enabled learning experiences, and stronger links between study and career opportunities.

Any potential negative impacts, such as on placement capacity, need to be carefully managed.

Your Plan should outline how your international education provision contributes to New Zealand's research, innovation and workforce development goals.



Funding is unlikely to match demand so our investment decisions will require trade-offs

Funding for 2027 is unlikely to meet all demand

We will reprioritise our investment by reducing investment in lower-performing and/or non-priority provision to ensure funding is directed towards priority areas that support economic growth and good learner outcomes.

We will invest in provision that supports an appropriate network of provision, achieves the best outcomes for learners, and responds to stakeholder needs and priorities.

When making investment decisions, we consider available funding, performance, relevance and access. We will actively:

- › consider alignment with the Government's priorities and our investment priorities
- › maintain our investment where we have confidence providers are financially sustainable, delivering well and can support good learner outcomes
- › reduce investment or disinvest in providers and/or provision that is lower performing and/or non-priority, consistently under-delivers, or is not meeting wider stakeholder needs, and
- › consider where our investment can be consolidated, while ensuring people considering study or training have opportunities to participate.

Our [Response Framework \(PDF 190 KB\)](#) describes how we manage educational delivery and performance where it needs to improve. The broader context that we are operating in influences the frequency, intensity and types of responses we use. The current fiscal environment means we may use responses more quickly, more intensely or differently. For example, we will use funding responses more quickly and you may receive a reduced indicative allocation.

Do not assume your funding will be maintained

We take a holistic approach to Plan assessment and consider a broad range of factors related to the specific circumstances of a provider when we make our funding decisions. However, our investment decisions for 2027 will be shaped by the likelihood that available funding is unable to meet demand.

We will carefully consider how we allocate our funds. That includes actively reducing funding across both providers and provision. This **does not** necessarily mean there will be additional funding for increasing priority provision in other areas.

You should plan for different potential scenarios

We encourage you to critically review your delivery in terms of alignment with our priorities and performance expectations. If you are delivering non-priority provision and your performance is below our minimum expectations you need to plan for a number of potential scenarios. Your planning should focus on the potential impact on funding for current learners. Possible scenarios are noted below:

- › You receive a reduced indicative allocation and/or final funding for provision you deliver.
- › No additional funding is available for your organisation in 2027.
- › In exceptional circumstances we may disinvest from all of your provision.

Our investment decisions factor in the network of provision

Each investment round, we make decisions to maintain and shape an appropriate network of provision across higher, vocational and foundation education. These decisions align to the Government's strategic aims and priorities.

The network of provision is the pattern of education and training on offer across New Zealand nationally, regionally and locally. It includes the type of provision offered, the level, and who provides it and to whom, as well as the volume and cost of that provision.

The network of provision includes both provision that is stable over time and provision that changes regularly to respond to the needs of stakeholders, such as employers and learners. When we make decisions relating to proposed new or changed provision, we consider how the proposed provision responds to regional needs and gaps in the current network of provision.

Your mission and role for the Plan period should:

- › **describe your organisation's contribution to the network of provision**
- › **be focused on the next three years, and**
- › **explain significant strategic initiatives you will undertake, highlighting any that reflect changes to your mission and role.**

If you are not required to submit a Strategic Intent but want to make significant changes to your Mix of Provision (MoP) for 2027, please use the [Mix\(es\) of Provision changes for investment in 2027 template](#) to provide information about proposed changes to your provision. We will consider whether to approve these changes when assessing your MoP. A significant change would be change that meets the [Significant Plan Amendment criteria](#).

NB: We have included the relevant sections of the Plan assessment table throughout this document so you can refer to these when drafting your Plan. This will help you understand what we are looking for when we assess your Plan.

See the following sections of the Plan assessment table:

- › Mission and role, p. 56
- › Responding to the TES, p. 58
- › Delivering programmes and activities and responding to investment priorities, pp. 58–59.

We invest strategically to support our priorities

As well as maintaining the network of provision, we take advice from key government, industry and regional stakeholders to determine our investment priorities. These include the Tertiary Education Strategy (TES) priorities, the targeted priorities (which respond to labour market and industry skill needs), and any other priorities mentioned. Our investment priorities should guide you to plan and prioritise provision.

Not all investment priorities need more providers or provision. Many priorities would be well met by improvements in learner achievement.

We consider the level of supply currently available across the tertiary network, other providers and delivery performance.

For detailed information on our targeted priorities see:

- › Higher education, pp. 35–37 and pp. 70–71
- › Vocational education, pp. 38–39 and pp. 72–81
- › Foundation education, pp. 40–42.

We expect you to:

- › **explain how your provision meets investment priorities, how it has changed since your last Plan and what changes you intend to make during this Plan period**
- › **adjust your provision toward the investment priorities where they are relevant to your mission, role and current programmes, and**
- › **focus on improving learner outcomes through your learner success approach, where relevant.**

Your understanding of our investment priorities should be evident in your leadership, strategies and policies as well as the programmes you create and deliver.

We expect that by successfully delivering your proposed Plan you will contribute to achieving the Government’s priorities, including the objectives and priorities described in the TES.

See the following sections of the Plan assessment table:

- › Mission and role, p. 56
- › Responding to the TES, p. 58
- › Delivering programmes and activities and responding to investment priorities, pp. 58–59
- › Outcomes and measures, p. 59.

You will need to reprioritise your funding, where relevant, to respond to our priorities

If you want to grow provision that aligns to our priorities, you will need to reprioritise funding within your existing allocation. We will not support reprioritisation that is outside of your mission and role or does not meet a need within the national or regional network of provision.

If you are considering reprioritising funding, we recommend that you talk to your Relationship Manager or contact us on 0800 601 301 or customerservice@tec.govt.nz.

Any shifts will need to be cost neutral.

If you are submitting a Strategic Intent this information should be included in section six – Delivering programmes and activities and responding to investment priorities.

If you are not submitting a Strategic Intent, please use the [Mix\(es\) of Provision changes for investment in 2027 template](#) to provide information about proposed changes to your provision.

Some high-level guidance on different reprioritisation scenarios is set out below:

- › **Shifting planned delivery from non-priority provision to priority provision –** likely to be supported in principle, but subject to considerations like previous

performance, available funding and the overall network of provision (including current levels of supply).

- › **Shifting planned delivery from priority provision to different priority provision** – likely to be supported in principle subject to available funding, but we may require information about why you want to make this change.
- › **Shifting planned delivery from non-priority provision to different non-priority provision** – may be supported in principle, but subject to considerations like previous performance, the wider network of provision, and overall funding availability. We may require information about why you want to make this change.
- › **Shifting planned delivery from priority provision to non-priority provision** – would not be supported.

See the following section of the Plan assessment table:

- › Delivering programmes and activities and responding to investment priorities, pp. 58–59.

Micro-credentials should be funded from your existing allocation

We will prioritise micro-credentials that are investment priorities.

You must complete the micro-credential approval process. If we approve your micro-credential for funding, we expect in most cases you will reprioritise funding from within your existing allocation.

For information on how to apply, see [TEO-developed micro-credentials – funding and fees](#).

Financial performance is a key factor in our decisions

It is critical that tertiary education providers are financially sustainable. We regularly assess the financial performance of all providers, and monitor those at risk very closely. Our monitoring informs all investment decisions, including:

- › whether to approve a Plan
- › whether to accept or decline repayment plans, and
- › whether to accept or decline requests for additional funding.

We may disinvest in providers that are not financially sustainable to minimise risks to learners and public funding. We will consider other factors (including the strategic value of provision and educational performance) before we make any decisions.

Providers experiencing financial challenges should engage with us as early as possible. We need to understand your plan to return to financial sustainability so we can factor this into our decision making.

See the following section of the Plan assessment table:

- › Financial information, p. 60.

We also consider an organisation's capability

Well-informed and engaged governance and management are essential for a well-functioning organisation.

We will look for evidence of how you plan to build and maintain your organisation's capability through strong governance, management and academic leadership. **We want to know if you have proactively made changes to your governance and leadership since your last Plan approval or are considering making any changes to these.**

See the following sections of the Plan assessment table:

- › Mission and role, p. 56
- › Learner success approach, pp. 56–57.



Supporting educational achievement
for all learners remains a priority

Improving achievement of educational outcomes takes a whole-of-organisation approach

More learners completing their qualifications ensures better economic outcomes for individuals and New Zealand.¹ Achieving this plays a key part in helping you to deliver on the Tertiary Education Strategy priorities.

The learner success approach is a whole-of-organisation commitment to lifting achievement and retention across all groups. Your approach should:

- › be supported by governance and senior leadership
- › detail long-term achievement goals, and
- › describe short-to-medium-term milestones to achieve these goals.

We expect to see improvement in educational outcomes across the whole tertiary education system. Where providers make progress with their learner success approaches, we are more likely to maintain or, in some cases, grow their provision. Where positive shifts are not occurring at the rate or scale we expect, this can affect our future investment decisions.

The learner success approach supports better educational outcomes and aligns to our performance expectations

We developed the learner success approach to help you develop and implement operating models that improve outcomes. It provides you with tools, such as the [Learner Success Framework](#) and the [Kia Ōrite Toolkit](#), to understand your learners and their changing needs, and address why and how your organisational model supports (or does not support) success.

Having effective and safe mechanisms for capturing learner voice, and using your data effectively, is central to informing and progressing your learner success approach. You need to continually monitor and evaluate the performance of your learners to ensure you are responding to their current needs.

We expect to see evidence of how your learner success work aligns with the core components of the [Learner Success Framework and capabilities](#), and the key fundamentals in the Kia Ōrite Toolkit.

Progress updates and next steps on your learner success approach are now integrated into your Strategic Intent

Following engagement with a range of providers and key stakeholders, the Learner Success Plan (LSP) and Disability Action Plan (DAP) components are now integrated into the Strategic Intent part of your Plan. This revised format streamlines requirements, reduces compliance and provides a clear and cohesive structure for your narrative.

¹ A recent study from London Economics estimates that increasing the proportion of our population with tertiary qualifications from 44% to 45% now would result in a \$458 million increase in New Zealand's GDP by 2029. See London Economics, [The impact of investments in higher education on economic growth \(PDF 1.5 MB\)](#).

The [Strategic Intent template](#) describes how to structure your narrative, in three parts:

- › your learner success approach: information about your whole-of-organisation approach to improving outcomes for all learners
- › support for apprentices: how you deliver apprenticeship activities consistent with legislative requirements (including the Code of Good Practice). These activities should form part of your learner success approach, and
- › your DAP: information about how you are removing barriers for learners with disabilities.

Where this content overlaps with priorities from the Tertiary Education Strategy, you only need to describe relevant activities under the learner success section.

All providers submitting a Strategic Intent will include learner success content

If you already have an established learner success approach with an LSP and a DAP, we want to understand:

- › the progress you have made against your commitments so far
- › whether your approach still contains key features, eg, owned at the governance level, and whole-of-organisation approach
- › how key lessons learnt from evaluation are informing your next steps for implementation, and
- › what next steps you will take.

If you are a new organisation building on existing learner success work (that includes an LSP and DAP) from a previous organisation, tell us the next steps you will take to adapt that approach and embed it within your new organisation.

If you are a new organisation building your approach from scratch, tell us the next steps you will take to develop the key fundamentals of your learner success approach to improve educational outcomes for all learners, especially under-served learners (for example who are Māori, Pacific, low socio-economic or disabled). The Tertiary Education Commission (TEC) can provide you with support in using the [Learner Success Framework](#), its [Capabilities](#), and the [Kia Ōrite Toolkit](#).

For all new organisations, we want to be confident that you are developing a robust approach that is tailored to your cohorts, region and/or industries as relevant. Once your learner success approach is built, we expect you will document it in an LSP and DAP as part of embedding learner success into your organisation. Documenting these is the best way to ensure your organisation remains focused on improving outcomes for your learners. They are also crucial reference points for showing progress in future Investment Plans.

See *Plan Components*, pp. 43–52, for further information on what to submit. **We strongly recommend you use the template so that we can assess your Plan robustly and consistently, and to avoid the need to repeat information throughout your Plan.**



We expect sector performance to improve at all levels and for all learner groups

Ongoing improvement in educational performance is critical to meeting New Zealand's future skills needs, and supports the objectives of the Tertiary Education Strategy.

We encourage you to leverage innovative approaches and technological advances to improve your productivity and support improvements in educational performance.

We expect to see sector-wide outcomes improving for all learners, recent declines reversing, and previous peaks being exceeded. We expect you to address any poorer outcomes for particular groups through your learner success approach.

You should expect additional scrutiny for significant achievement gaps or static gap trends between learner cohorts. Achievement of Māori and Pacific learners continues to be lower than that of others.

Our performance expectations set out below expand on the expectations in last year's Plan Guidance. These expectations guide our investment assessment process and are included here to clarify what **good** looks like. Generally, the expectations are based on the 2024 sector rate for each measure (for all learners). This approach also responds to your feedback via the Tertiary Sector Survey, asking for more transparent guidance and expectations on performance.

We measure sector performance using the defined educational performance indicators (EPIs). While we acknowledge providers use other metrics, it's important that you understand EPIs, and use DXP Ngā Kete to assess your results.

We have a range of metrics to select from and consider in relation to the learner cohort concerned. These nuanced considerations allow for learner characteristics and level of study. For example, our expectations for foundation-level learners are different from those at post-graduate level, and therefore also for the providers they are enrolled with.

We expect performance improvements to continue and a focus on closing achievement gaps

2024 saw some increases in performance, which we anticipate continuing, following the expectations signalled in last year’s Plan Guidance. However, some performance is not at acceptable levels.

The following table describes recent performance trends and performance we expect. Yearly improvements must be demonstrated by providers that are below specified performance rates. Providers currently above these rates should **at least maintain** them.

All providers must continue to address any continuing educational performance gaps between different groups of learners, particularly where they are below the sector average for the provision or trends are static or declining. **We will specifically focus on providers with gaps that exceed five percentage points.**

See Appendix A for detailed performance information from 2017 to 2024.

Area of provision	Recent trends	We expect to see ...
Level 7 degree (DQ7-10)	<p>First-year retention and course completion rates continue to be high at the sector level.</p> <p>Qualification completion rates must continue to improve. The performance gaps remain and have worsened in some areas.</p>	<ul style="list-style-type: none"> › focus on addressing achievement disparity between learner groups and improving qualification completion rates › course completion and first-year retention rates improving yearly for providers that are below: <ul style="list-style-type: none"> › 80% for course completions › 65% for first-year retention › a minimum first-year retention rate of 70% › qualification completion rate greater than 50% or 60%, dependent on cohort size, network of provision and priority considerations.
Levels 8–10 (DQ7-10)	<p>Performance rates are fairly static, but there is little change in the achievement gap for some learners.</p>	<ul style="list-style-type: none"> › focus on addressing achievement disparity between learner groups.

Area of provision	Recent trends	We expect to see ...
DQ3-7 work-based	<p>Programme completions were signalled for immediate attention last year. Overall, the declines appear to be levelling off, except for apprentices. The completion rate for apprenticeships has reduced again, and the achievement gap between different learner groups is worse than for all work-based provision.</p> <p>Credit achievement rates have increased since 2022, but the achievement gap continues to require attention.</p>	<ul style="list-style-type: none"> › a minimum credit achievement rate of 50% › providers focusing on supporting learners to successfully complete their programmes › a minimum first-year apprentice retention rate of 60% › performance improving yearly at providers that are below the 2024 sector rates of: <ul style="list-style-type: none"> › 78% for credit achievement › 66% for apprenticeship first-year retention, and › 57% for programme completions.
DQ3-7 provider-based	<p>Course completion rates have improved for all groups since 2022.</p> <p>Qualification completions declined further in 2024.</p> <p>There are still significant performance gaps between different learner groups.</p>	<ul style="list-style-type: none"> › a minimum course completion rate of 50% › outcomes for provider-based Māori and Pacific learner groups moving closer to the rates for non-Māori and non-Pacific learners › providers maintaining and improving course completions (and retention) and ensuring this results in increased qualification achievement rates › performance improving yearly at providers that are below the 2024 sector rates of: <ul style="list-style-type: none"> › 78% for course completions › 61% for first-year retention, and › 58% for qualification completions.

Area of provision	Recent trends	We expect to see ...
Youth Guarantee	2024 saw overall increases in Youth Guarantee qualification completion rates; the reduction in completion rates for Pacific learners and the lower achievement rate for Māori must be addressed.	<ul style="list-style-type: none"> › performance that is at least above the published minimums › performance improving yearly at providers that are below the 2024 sector rates of: <ul style="list-style-type: none"> Level 1 › 75% for course completions, and › 61% for qualification completions Level 2 › 75% for course completions, and › 63% for qualification completions Level 3 › 79% for course completions, and › 72% for qualification completions.
DQ Levels 1 and 2	2024 saw a significant uptick in course completions. We expect to see this reflected in higher qualification completions in 2025. However, improvements are still required for Māori and Pacific peoples.	<ul style="list-style-type: none"> › a minimum course completion rate of 50% › performance improving yearly at providers that are below the 2024 sector rates of: <ul style="list-style-type: none"> › 75% for course completions, and › 56% for qualification completions.

Consider your performance, capability and learner success journey when you set Educational Performance Indicator Commitments

If you are required to set Educational Performance Indicator Commitments (EPICs), consider your current performance, capability, and the stage you are at in improving learner success.

If we have raised specific concerns about the achievement of your learners, you will need to provide a robust plan to address these. For further information about how we manage performance when it needs to improve, see our [Response Framework](#). We also want to know if you are making any changes to your organisation that could have a significant impact on your future performance.

See the following sections of the Plan assessment table:

- › Learner success approach, pp. 56–57
- › Outcomes and measures, p. 59
- › Additional requirements/TEOs with identified performance issues, p. 60.



We invest in higher education to
generate skills, knowledge and
productivity

Higher education provides advanced learning which, in turn, contributes to economic growth and productivity. It creates highly skilled people, generates research and supports knowledge transfer and application. This can have valuable commercial benefits, which the Government wants to grow.

Higher education has national and international benefits. It:

- › prepares learners for successful careers, through connecting learning to better employment outcomes and developing work-ready skills
- › contributes to a highly skilled workforce to meet business and other needs
- › supports education and research in important economic, social and cultural areas, and
- › builds the future academic and research workforce through postgraduate pathways.

The Government is focused on higher education and research that is well integrated with businesses and public research organisations, and reflects its priorities for the science, innovation and technology system.

We invest in degree and postgraduate provision to help ensure New Zealand has a highly skilled and productive workforce that contributes to economic growth through research, innovation and entrepreneurship.

Targeted priorities for higher education reflect national skills needs

Most higher education offers qualifications that support a range of sectors by developing critical transferable skills. To recognise this, we are using the same format for these targeted priorities that we introduced last year, focusing on areas specific to the industry and not listing the generally applicable qualification, even where a skills gap has been identified in that area by stakeholders.

For most higher education targeted priorities, we expect you to reprioritise and discuss changes in your provision with us before you submit your Plan for 2027. We will only fund new providers or new levels of provision in these sectors in exceptional circumstances where we can see they will meet a currently unmet need.

See pp. 29–34 and pp. 61–69 for our performance expectations for higher education.

Most providers in these sectors have regular engagement with Relationship Managers who can support your responses to these targeted priorities. For those who don't, please contact us on 0800 601 301 or customerservice@tec.govt.nz.

Considerations for all higher education priorities

For all higher education priorities, we will consider how you are offering:

- › innovative delivery of priority provision (eg, work-integrated learning or employment-based learning) that supports good learner outcomes, increases workforce diversity, and responds to financial pressures on learners
- › flexible options that ensure increased access for learners (eg, part-time or timetabling options that accommodate work and family commitments, and clear credit recognition and transfer policies)
- › programmes that show well-developed approaches to improving learner achievement and completion rates, particularly for under-served learners

- › agile and responsive delivery models that support learners to make use of the skills and knowledge they already have, upskill and retrain, and complete shorter/transition qualifications (eg, micro-credentials)
- › innovative ways of merging disciplines to reflect the reality of work in a sector (eg, composite degrees such as combining science with up-to-date technology skills)
- › programmes that embed artificial intelligence (AI) in research and teaching (in a way equivalent to the [Public Service AI framework](#)), and
- › graduate research programmes with entrepreneurial content or a focus on entrepreneurial and commercialisation skills that align with the *Economic Impact and Innovation* priority in the Tertiary Education Strategy (TES).

In a very tight fiscal environment, any new proposed provision needs to be aligned with your mission, role and capability. If you want to grow provision that aligns to our priorities, you will need to reprioritise within your existing allocation.

When you make significant changes to your Mix of Provision, move into new areas or levels of provision, or seek additional funding (if available), we expect a narrative that explains how the provision reflects our priorities for higher education.

In addition to the considerations above, sector-specific priorities are detailed in Appendix B, pp. 70–71.

See the following sections of the Plan assessment table:

- › Addressing the needs of key stakeholders, p. 56
- › Responding to the TES, p. 58
- › Delivering programmes and activities and responding to investment priorities, pp. 58–59.



Vocational education delivers skills to regional economies, industries and communities

Vocational education and training (VET) is crucial to support regional economic development through skills that lead to better employment outcomes and business productivity. It gives people the opportunity and flexibility to gain an education directly relevant to specific occupations and retains young people and workers within regions.

Delivering apprenticeships and other work-based learning

If you are delivering apprenticeships, your Plan needs to show how you are supporting good practice and meeting legislative requirements. See *Plan components*, p. 47, for information on apprenticeship training requirements.

While these activities are requirements for apprenticeships, we consider them best practice for all work-based learning (WBL) and expect to see similar approaches for all work-based learners.

See pp. 29–34 and pp. 61–69 for our performance expectations for VET.

We are not making changes to or diversifying the network of provision for work-based learning at present

During 2026 we will engage with employers, Industry Skills Boards and industry groups to understand the network of WBL provision they want for their sectors. Once we have a clearer picture of the network of WBL that industry wants, we will look to implement any changes. This may include additional WBL providers and/or expansion of current providers' range of provision.

Providers currently delivering WBL

- › If you want to grow your existing provision to respond to our priorities, you will need to reprioritise within your existing allocation.
- › We will make additional investment in current WBL providers in exceptional circumstances only.
- › You are not able to expand into new areas of WBL provision without our explicit permission. For further information see [Work-based learning changes from 2026](#). This information will be updated regularly.

VET targeted priorities identify changes needed to provision

The vocational education targeted priorities identify areas where changes in the number of graduates are needed to meet industry workforce needs. We want you to consider these priorities when planning the programmes you will deliver from 2027. Vocational education targeted priorities are detailed in Appendix C, pp. 72–81.

Some priority provision only has a small number of providers. In these cases, we will engage directly with the provider(s).

See the following sections of the Plan assessment table:

- › Addressing the needs of key stakeholders, p. 56
- › Support for apprentices, p. 57
- › Responding to the TES, p. 58
- › Delivering programmes and activities and responding to investment priorities, pp. 58–59.



We invest in foundation education so
New Zealanders can gain core skills

We invest in foundation education so that every adult in New Zealand can develop the core foundation skills they need, such as language, literacy, numeracy and digital skills. These skills are linked to better employment opportunities, higher income levels and positive impacts for individuals and their community throughout their lifetime.

The delivery of foundation education contributes to a productive economy and social and wellbeing outcomes. It supports the objectives of the *Achievement* and *Access and Participation* priorities in the Tertiary Education Strategy (TES).

The targeted priorities for foundation education focus on learning opportunities

Our targeted priorities for foundation education focus on core skills and pathways into other learning opportunities and/or employment through either formal or non-formal learning.

In a very tight fiscal environment, any new proposed provision needs to be aligned with your mission, role and capability. If you want to grow the delivery of provision that aligns to our priorities, you will need to reprioritise within your existing allocation.

See pp. 29–34 and pp. 61–69 for our performance expectations for foundation funds.

Youth Guarantee supports young people’s transition from school to further study, training and employment

Youth Guarantee (YG) provides fees-free tertiary education at Levels 1–3 to enable young people aged 16–24 years who have no or low prior qualification achievement to progress to higher-level education or employment.²

The key principles we will consider when prioritising investment in YG provision are:

- › programmes that reach young people who may not otherwise engage in tertiary education
- › delivery in geographic areas that do not currently have YG provision available
- › learning and tailored support that helps young people to move into higher-level education and/or employment
- › support for young people to identify and meet their education, employment and career goals
- › providers with strong stakeholder/community networks providing targeted support for young people
- › programmes that are aligned to one or more vocational qualification pathways, including these six [Vocational Pathways](#), and are designed with an understanding of the diverse and complex needs of the target youth cohort, and
- › programmes that deliver good outcomes for young people and show well-developed approaches to improving learner achievement.

² Funding for Youth Guarantee provision at Level 3 is limited and will be prioritised for learners who study towards Level 1 and 2 qualifications in Youth Guarantee and progress to Level 3 study during their funding entitlement, and learners who have no or low (Level 1) prior achievement before enrolling in Youth Guarantee.

Foundation education targeted priorities

These priorities focus on developing core skills, including language, literacy and numeracy, to enable learners to fully participate in life, work and further study. Along with the specific requirements for individual foundation funds, we will consider key principles when prioritising investment in foundation education.³ These principles include supporting:

- › programmes that reach learners who may not otherwise engage in tertiary education
- › delivery in geographic areas that do not currently have provision available at foundation level
- › learning and other support that helps learners to move into further education and/or employment
- › providers with strong stakeholder networks which better support learner education and/or employment outcomes, and
- › programmes that deliver good outcomes for learners and show well-developed approaches to improving learner achievement.

Adult and Community Education targeted priorities

Adult and Community Education (ACE) provides learning opportunities that meet community learning needs. Our priorities for ACE investment (ACE in Schools, ACE in Communities and ACE in TEIs) remain unchanged. The priorities of ACE funding are for programmes that:

- › improve employability:
 - › courses focused on employability
 - › life skills such as financial literacy
 - › introductory “taster” courses
- › promote social and cultural inclusion and participation:
 - › languages, including te reo Māori, New Zealand Sign Language, English Language Teaching, Pacific languages (especially Realm languages) and Asian languages
 - › courses supporting digital inclusion
- › raise foundation skills:
 - › courses in literacy, numeracy and/or digital literacy
- › improve health and wellbeing:
 - › courses such as parenting, mental health and resilience, or conflict resolution/anger management.

See the following sections of the Plan assessment table:

- › Addressing the needs of key stakeholders, p. 56
- › Responding to the TES, p. 58
- › Delivering programmes and activities and responding to investment priorities, pp. 58–59.

³ For information on the foundation funds these principles apply to, see the [2026 Funding Conditions Catalogue \(PDF 3.5 MB\)](#).



Plan components

You need to know what Investment Plan components to submit

Not all providers need to submit all Plan components every year. It can vary depending on:

- › the amount of on-Plan funding you receive
- › whether you already have an approved Plan
- › whether there are any performance concerns.

We have provided flow charts which show which components you need to submit for 2027 investment on pp. 51–52.

You will receive confirmation of your Plan status for 2027 shortly. If you need more information, contact your Relationship Manager or 0800 601 301 or customerservice@tec.govt.nz.

You must submit all required components of your Plan fully completed by **3 July 2026** via [DXP Ngā Kete](#).

We will work directly with private training establishments (PTEs) receiving work-based learning (WBL) provision as part of the transition from Industry Skills Boards (ISBs)

The Tertiary Education Commission (TEC) will work directly with new WBL PTEs that stand up during 2026 and 2027 as part of the transition from ISBs, as funding arrangements can be made outside of the normal investment round timing. TEC will work directly with the ISBs and the recommended receiving providers.

All providers must meet our core expectations

For **all providers**, we want to see information that helps us understand your contribution to the tertiary education network over your previous Plan period and what you intend to do over your proposed Plan period. This includes:

- › your mission and role and how you will give effect to the Tertiary Education Strategy (TES)
- › how you respond to the needs of your stakeholders
- › your learner success approach and activities
- › the current and projected achievement of your key learner cohorts
- › research-related activities (where relevant), and
- › how the above are operationalised through the programmes and activities you deliver.

Tertiary education institutions (TEIs) must provide evidence of how your Council acknowledges and supports the collaboration and partnership objectives of the TES, and legislated obligations under the Education and Training Act 2020 to Te Tiriti o Waitangi (Te Tiriti) and to support Māori–Crown relationships.

PTEs should show how, as a government-funded organisation, you are considering Te Tiriti.

Good quality provision should be designed and delivered to support learners and industry

We are interested in investing in good quality provision at all levels. This provision should be designed and delivered to support flexibility for learners and employers (where relevant) and respond to industry, employer and regional needs.

Efficient delivery models support learners to complete their qualifications, which means that employers have quality graduates coming through the system. This is particularly relevant to the targeted priorities.

Quality provision leads to good achievement levels and contributes to good post-study outcomes through employment or transitions to higher-level education.

We have specific expectations for tertiary education institutions

We recognise that different providers fill different roles in the tertiary network, and we expect your Plans to reflect those roles and any specific functions your organisation has.

For **universities**, we expect Plans and associated activities to reflect on what you have achieved over the previous Plan period and explain what you intend to do to:

- › maintain international standards of teaching and learning, and research
- › focus on advanced learning, and
- › generate, apply and transfer knowledge for national and international benefit, including through commercialisation.

For **polytechnics**, your Plan should reflect your role in responding to the educational needs of learners, local communities and industries, while considering your financial sustainability.

TEC will work closely with you as you develop your Plan. Your Relationship Manager will provide ongoing advice and up-to-date information as part of our engagement process starting in March 2026.

We will work directly with any **polytechnics** that are established as stand-alone entities during 2026 or 2027 as funding arrangements can be made outside of the normal investment round timing.

For **wānanga**, your Plans should reflect your unique role in teaching and research that:

- › maintains, advances and disseminates Mātauranga Māori (Māori knowledge), and
- › assists in applying knowledge regarding āhuatanga Māori (Māori tradition) according to tikanga Māori (Māori custom).

Alongside funding for delivery, we will assess how the activities and initiatives delivered by wānanga through the Ngā Whare Wānanga Allocated Fund support the characteristics of wānanga as set out in section 398D of the Education and Training Act 2020.

TEIs must provide us with a range of information

TEIs have the capacity and statutory obligation to make contributions of regional and national importance.⁴ Your Plan should include a forecast Statement of Service Performance (SSP) to enable you to report in your annual report on your performance. The content of your SSP and other strategic documents should align with your proposed Plan.

Your proposed Plans must also reflect any TEI outcomes frameworks agreed with us, and include forecast financial statements.

See the following sections of the Plan assessment table:

- › Delivering programmes and activities and responding to investment priorities, pp. 58–59
- › Additional requirements/tertiary education institutions, p. 60.

Providers receiving PBRF funding must complete the strengthened research component for 2027 investment

As part of introducing the Tertiary Research Excellence Fund (TREF), all providers receiving Performance-Based Research Fund (PBRF) funding need to complete the strengthened research component for 2027 investment.

- › This information can be submitted in the Strategic Intent template.
- › If you are not required to submit a Strategic Intent for 2027, your Relationship Manager or Relationship Advisor will work with you to support the submission of this information through the [Research Activities for investment in 2027 template](#).

We recognise that providers carry out a wide range of different research activities appropriate to their mission and role within the New Zealand research system. The strengthened research component in Plans (see the Strategic Intent template) asks you to describe:

- › your institutional strengths and specialisations in research, including fundamental research activity, research-led teaching and postgraduate provision
- › how external research funding will support your research activities, and
- › your proposed research outcomes and impacts, how you will measure them, and how you will navigate potential barriers and obstacles to achieving them.

It also asks you to describe the activities you will undertake relevant to your role in the research system, including what steps you will take to implement these activities, and any measures you may use to evaluate the activities:

- › approaches to industry collaboration, knowledge transfer, and research commercialisation
- › engagement with end-users, including industries and employers, iwi, and communities

⁴ This includes community and employer engagement, knowledge-sharing activities and a focus on understanding and meeting in-demand skill and research needs. For universities, contributions include commercialisation of research activity and integration with businesses and public scientific research institutes.

- › international collaborations and partnerships, regional and national collaborations with industry, public research organisations (PROs), and other tertiary education organisations (TEOs) in the broader science, innovation and technology sector
- › research workforce development and strategies to increase research intensity, including increasing externally funded research activity, and
- › exploring the distinct contributions of Mātauranga Māori and Pacific research to national and global challenges and scholarship.

See the following section of the Plan assessment table:

- › Research-related activities, p. 58.

There are requirements for providers delivering apprenticeships and other work-based learning

If you are delivering apprenticeships, you need specific content in your Plan to show how you are supporting good practice and meeting legislative requirements. Your Plan needs to specifically describe how you will meet the following apprenticeship training requirements to:

- › promote apprenticeship training generally through providing information, guidance and advice to employers and prospective apprentices about the benefits of an apprenticeship
- › identify prospective apprentices and employers able to offer apprenticeship training that satisfies all of the work-based requirements of the programmes you deliver
- › provide or arrange training or employment that may lead to apprenticeship training for prospective apprentices
- › help prospective apprentices enter into apprenticeship training agreements;
- › produce individual training plans and facilitate their implementation consistent with an apprentice’s apprenticeship training agreement
- › ensure that the [Code of Good Practice for New Zealand Apprenticeships \(PDF 1.4 MB\)](#) (the Code) is applied to apprenticeship training and every apprenticeship training agreement
- › monitor individual apprentices to ensure that their training enables them to complete a qualification in the specified industry within a reasonable time, and
- › provide or procure appropriate pastoral care and support for apprentices, with regard to their age and experience and the Code.

While these activities are requirements for apprenticeships, we consider them best practice for all work-based learning and expect to see similar approaches for all work-based learners.

See the following section of the Plan assessment table:

- › Support for apprentices, p. 57.

Providers with provision for the Department of Corrections must inform us

All programmes for learners in Department of Corrections' (Corrections') care must be included in your Mix of Provision (MoP). We also need to know the following specific details of this provision:

- › the programme
- › number of EFTS
- › region of delivery, and
- › the mode of delivery (face-to-face or extramural).

If this information is not already itemised in your MoP, you will be required to complete an additional [2027 Corrections provision template](#). When submitting this template, you must still include Corrections' provision in your MoP.

We need this information to ensure we are funding a good range of provision across the Corrections network. We will verify with Corrections how the proposed provision in your Plans matches its expectations for the year ahead.

Providers delivering te reo Māori or Pacific languages must inform us

As part of the Māori Language in Education Strategy, [Tau Mai Te Reo](#), we will continue to support immersion/Māori-medium provision that leads to fluency. Our focus is increased graduates at Level 4 and above.

If you are a kaupapa Māori education organisation, we expect you will have unique characteristics and approaches to support your ākongā.

If you deliver provision that supports Pacific languages in education as well as Pacific bilingual and immersion education, we want to know.

New provider applications will be limited

You must contact us to discuss your situation before applying for on-Plan funding. If you are invited to apply, we will send you the relevant application form and you will be required to provide evidence that you meet one or more of the criteria.

We will only invite and approve new providers that meet our criteria. For work-based learning (WBL), this will be in exceptional circumstances only. New providers⁵ need to be proposing to deliver provision aligned with our strategic priorities for investment and meeting unmet needs. Our approach to new provider applications is informed by funding availability, network of provision considerations and evidence of demand as well as good financial viability and educational capability.

⁵ A new provider is a provider that has not received TEC on-Plan funding in the last 12 months.

You can request the template for an initial Plan application from March 2026. New provider initial Plan applications need to be submitted by 1 May 2026.

For more information see the new provider application timeline below and [New applications for on-Plan funding](#).

We are not considering expanding the network of WBL at present

We will only consider additional WBL providers⁶ if industry confirms they want to see an expanded network of provision for their specific sector, and subject to the availability of funding. Providers currently delivering WBL may not expand into new areas of WBL provision without our explicit permission.

For further information see [Work-based learning changes from 2026](#). This information will be updated regularly.

You must meet the Plan submission deadline. If we do not receive all required components of your Plan on time, this may delay your funding or make you ineligible for funding. The timeline for new provider applications is below:

Activity	Timing
New providers can contact TEC to request template for initial Plan application	From March 2026
New providers submit initial Plan application	By 1 May 2026
TEC reviews new providers’ initial Plan applications	April–May 2026
TEC makes decision to invite new providers to submit full Plan, or to decline to fund	By 26 June 2026
New providers submit full Plan (including any revisions to initial Plan application)	By 24 July 2026
TEC reviews proposed Plans (including further discussion with providers as needed)	July–October 2026
Providers are notified of decisions in writing	From November 2026
First payments made against Plans; Plan delivery begins	January 2027

Not all providers will need to submit Educational Performance Indicator Commitments (EPICs) for 2027 investment

You only need to submit and upload an EPICs template if your approved EPICs are out of date, ie, they cover 2024–26. Otherwise, you do not need to submit EPICs.

You may also submit additional information to explain your targets, especially if your current EPICs are below sector averages. Updated EPICs, if required, should cover the following three years, ie, 2027–29.

⁶ This includes both existing WBL providers wishing to expand into a new area of WBL provision and new providers not currently receiving any on-Plan funding from TEC.

We are currently progressing work reviewing EPICs which may change what we require TEOs to submit in the future. We will consult with the sector as the work progresses.

The following funds are allocated through Investment Plans

The on-Plan funds are:

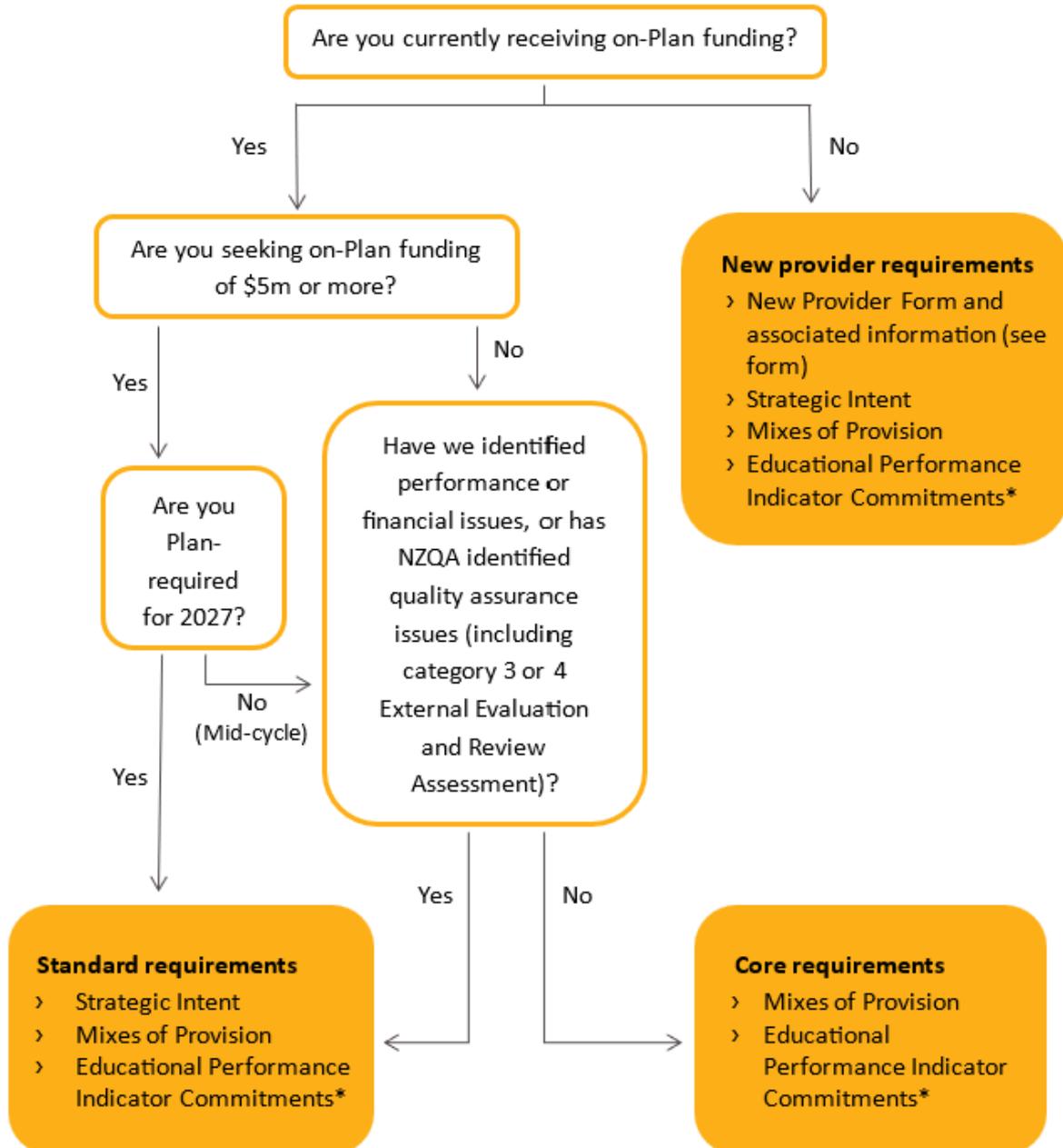
- › Adult and Community Education (Communities) Fund
- › Adult and Community Education (Schools) Fund
- › Adult and Community Education (TEIs) Fund
- › Delivery at Levels 1 and 2 on the New Zealand Qualifications and Credentials Framework (NZQCF) Fund (DQ1-2)
- › Delivery at Levels 3 to 7 (non-degree) on the NZQCF and all industry training Fund (DQ3-7)
- › Delivery at Levels 7 (degree) to 10 on the NZQCF Fund (DQ7-10)
- › English Language Teaching – Intensive Literacy and Numeracy Fund (ELT)
- › English Language Teaching – Refugee English Fund (Refugee English)
- › Equity Fund
- › Intensive Literacy and Numeracy Fund (ILN)
- › Learner Component
- › TEO-led Workplace Literacy and Numeracy Fund (TEO-led WLN)
- › Youth Guarantee Fund (YG).

Information about each of these funds can be found on [Fund Finder](#).

Different providers need to submit different Plan components

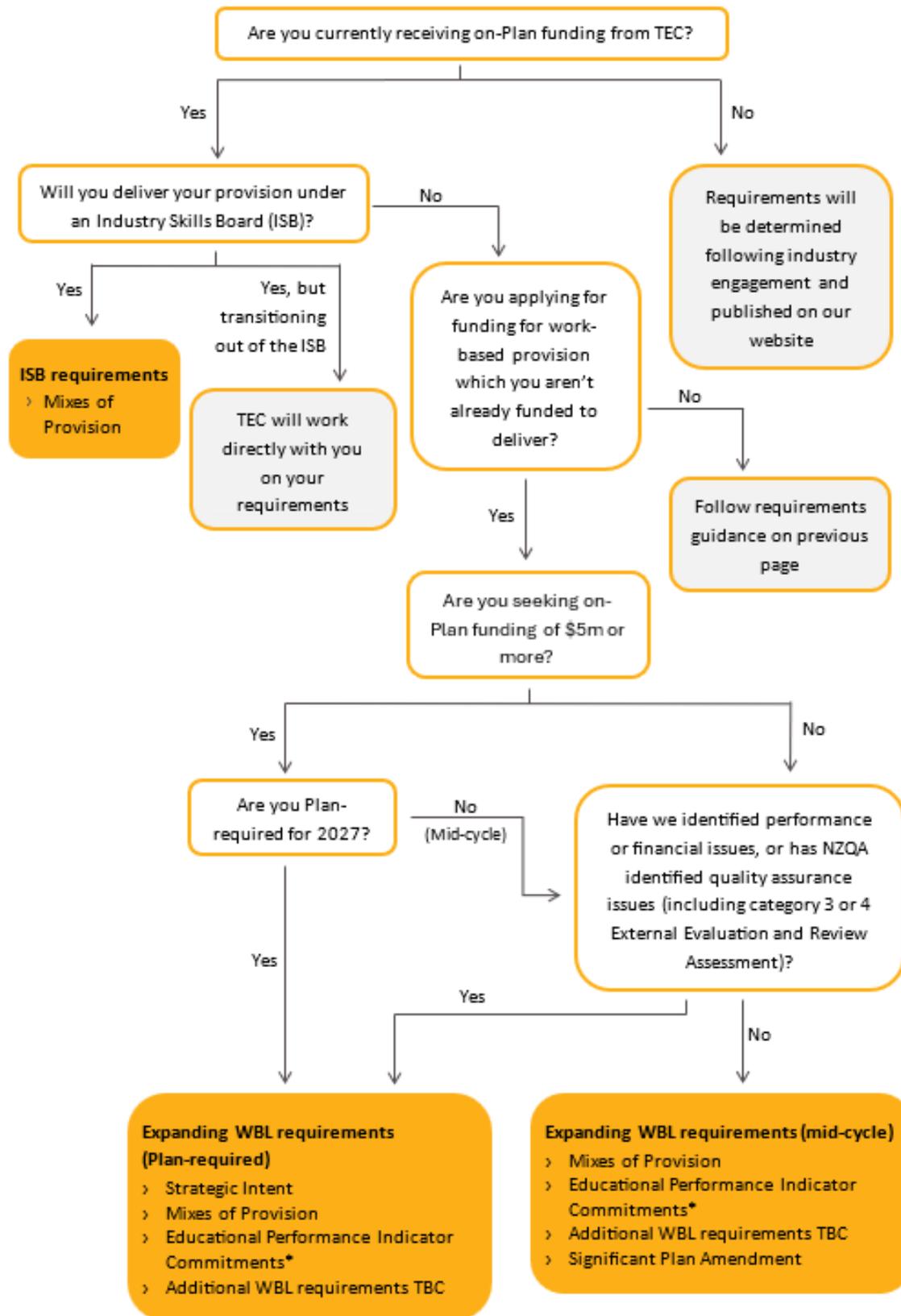
The flow chart below clarifies what you need to submit. If your Plan includes work-based provision, see the next page instead.

If you need more information, contact your Relationship Manager or us on 0800 601 301 or customerservice@tec.govt.nz.



* EPICs are only required for those years for which you have not already had EPICs approved.

Specific requirements if you want to deliver work-based provision



* EPICs are only required for those years for which you have not already had EPICs approved.



How we will assess your Plan

We take a holistic approach to Plan assessment

This section describes the main things we look for when we assess your Plan. This section is provided as an aid only and we recommend referring to the *Plan Gazette* notice when developing your Plan.

We strongly recommend using our [Strategic Intent template](#) to complete your Plan. You must use the [Mix of Provision template](#) and, if required, the [Educational Performance Indicator Commitment template](#). These templates ensure that you submit the required information and that we can assess it effectively and efficiently.

We invest public funding in a provider based on our assessment of how effectively its proposed Plan will contribute to meeting stakeholder needs⁷ and investment priorities over the Plan period.

We want to support you to develop a good Plan for your organisation. To do this, you need a solid understanding of the Government's goals for the tertiary education system. You also need to understand our priorities, performance expectations and investment intentions. When assessing proposed Plans against the criteria we will take a holistic approach and may use a range of evidence, including:

- › information contained in a Plan and/or previous Plans, its quality and progress against it
- › the Tertiary Education Commission's (TEC's) engagement and monitoring information including:
 - › previous funding allocations
 - › past delivery, including under-delivery and over-delivery (above 105% where relevant)
 - › achievement against previous Learner Success Plans (LSPs) and Disability Action Plans (DAPs) or any updates (where applicable)
 - › previous compliance with funding conditions
 - › organisational and financial data
 - › educational performance indicators
 - › other indicators of performance
- › quality assurance bodies' information and reports
- › information about your financial outlook
- › previous audit results or investigations
- › Plan engagement (where applicable)
- › national and regional demographic and economic data
- › post-study outcomes of learners
- › information in other applications you may submit to TEC
- › your annual reports, strategic plans and transition plans (where applicable), and
- › the overall quantum of evidence available for assessment.

We may also ask for information about your financial performance and forecasts. We may use this, or information we already have, to assess whether you are likely to have the financial ability to deliver on your Plan.

⁷ These stakeholders include, but are not limited to, learners, communities, regions, iwi/Māori, employers and industries.

We consider other factors in our investment decisions which may be outside of our or your control. This includes, for example, available funding, merit relative to other Plans, industry skills needs, the network of provision, and industry views on the network of work-based learning (WBL) provision.

We reserve the right to base investment decisions on the information available by the relevant due dates.

We assess every Plan against overall criteria

In assessing each Plan, assessment criteria apply to any and all elements of the Plan and to the range of evidence above we use to assess a Plan.

Overall, we want to be confident that you will:

- › contribute appropriately and sufficiently to the achievement of Government priorities including those in the Tertiary Education Strategy (TES)
- › meaningfully improve learner outcomes, including for under-served learners
- › address regional and national needs
- › have an appropriate mix of programmes and activities
- › have sufficient and appropriate capability to deliver on your Plan
- › have sufficient financial viability and sustainability to deliver on your Plan
- › work constructively with your stakeholders, including learners, and meet their needs
- › deliver your Plan
- › make appropriate and sufficient progress against your commitments, and
- › measure your progress and use this information to improve further.

It is also important that you submit all information required (including the relevant Plan components and any other relevant applications) in the required timeframes. Without this, we cannot make a well-informed assessment of your Plan and may not be able to allocate funding.

We also use specific criteria to assess specific Plan components

For specified components of your Plan, we will look for certain content to be included and well explained. The table below helps you understand our expectations and assessment approach for these components.

Plan assessment table

Plan components and relevant templates	What we look for in our assessment
<p>Mission and role</p> <p>Strategic Intent section 1</p>	<p>This section should tell us your organisation’s contribution within the network of tertiary provision, focusing on the next three years. We want an overview of the significant strategic initiatives you will undertake over the proposed Plan period, highlighting any that reflect changes to your mission and role.</p> <p>We also want to know what you have achieved over your current approved Plan period (if you have one) and how you are using any lessons learned to inform what you will do during this Plan.</p> <p>We need to know how you are meeting legislative obligations to Te Tiriti and Māori-Crown relationships under section 4(d) of the Education and Training Act 2020 (the Act).</p> <p>Tertiary Education Institutions have additional obligations under section 281(1)(b) of the Act.</p> <p>We will use information in your Plan to understand how you contribute to the network and to outcomes for New Zealand, the context of your provision (programmes) and activities, your capability to deliver on your proposed Plan and meet stakeholder needs, your progress and improvement, and rationale for any changes.</p> <p>We want to be confident you will:</p> <ul style="list-style-type: none"> › make an appropriate contribution to the network of TEC-funded provision › deliver better outcomes for New Zealand, especially for under-served learners › have strong governance, management and academic leadership capability to deliver on your Plan (including if you are proactively making changes to improve this) › are meeting legislative obligations to Te Tiriti and Māori-Crown relationships › have made appropriate progress since the previous Plan on activities that contribute to your mission and role, and › as appropriate, use this progress to inform future changes to your mission and role.
<p>Addressing the needs of key stakeholders</p> <p>Strategic Intent section 2</p>	<p>This section should show how you are working with your key stakeholders. We expect your key stakeholders to include:</p> <ul style="list-style-type: none"> › enrolled and prospective learners › employers, industries, businesses or communities relevant to your areas of delivery › iwi, hapū and whānau, and › regional organisations. <p>It is important that you explain, where relevant, how your stakeholder engagement helps you to best support under-served learners (for example, those from low socio-economic backgrounds, with low prior achievement, or who are disabled, neurodivergent, Māori and/or Pacific). This may involve working with learner groups, community groups, disability groups, iwi/Māori organisations and Pacific community groups. As Industry Skills Boards mature and provide insights and publications relevant to their sectors, we will expect providers delivering vocational education and training to be guided by this information.</p> <p>We want to be confident that you:</p> <ul style="list-style-type: none"> › know who your stakeholders are and what they need and expect of you › have consulted with them, will meet their needs, and meaningfully report progress to them, and › have prepared your Plan in consultation with them.
<p>Learner success approach</p> <p>Strategic Intent section 3a</p>	<p>If you already have an established approach to learner success we want to understand:</p> <ul style="list-style-type: none"> › the progress you have made against the commitments in your learner success approach › whether your approach still contains key features (eg, being a whole-of-organisation approach, and being owned at the governance level) › how key lessons learnt from evaluation are informing your next steps for implementation, and

	<ul style="list-style-type: none"> › what next steps you will take. <p>If you are a new organisation building on an approach to learner success from a previous organisation, tell us the next steps you will take to adapt that approach and embed it within your new organisation.</p> <p>If you are a new organisation building your approach to learner success from scratch, tell us the next steps you will take to develop the key fundamentals of your learner success approach to improve educational outcomes for all learners, especially under-served learners (for example who are Māori, Pacific, from low socio-economic backgrounds or disabled).</p> <p>For all new organisations, we want to be confident that you are developing a robust approach that is tailored to your cohorts, region and or industries as relevant.</p> <p>We want to see that you:</p> <ul style="list-style-type: none"> › have made appropriate progress on your learner success approach › are developing and/or implementing an approach that is consistent with the Learner Success Framework › are gathering and will gather robust evidence about your progress › have applied and will apply that evidence appropriately to inform your overall approach (including any changes to it) and specific next steps, and › will undertake sufficient and appropriate activities that will meaningfully progress your approach and improve outcomes, particularly for under-served learners.
<p>Support for apprentices Strategic Intent section 3b</p>	<p>For providers delivering apprenticeships, we will assess your Plan to confirm that you have included specific information required under section 382 of the Education and Training Act 2020. Many of these requirements align with our expectations of your learner success approach. In either section 3a above or here, give us confidence that you will deliver the following activities successfully and appropriately:</p> <ul style="list-style-type: none"> › promote apprenticeship training generally through providing information, guidance and advice to employers and prospective apprentices about the benefits of an apprenticeship › identify prospective apprentices and employers able to offer apprenticeship training that satisfies all of the work-based requirements of the programmes you deliver › provide or arrange training or employment that may lead to apprenticeship training for prospective apprentices › help prospective apprentices enter into apprenticeship training agreements › produce individual training plans and facilitate their implementation consistent with an apprentice’s apprenticeship training agreement › ensure that the Code of Good Practice for New Zealand Apprenticeships (PDF 1.4 MB) (the Code) is applied to apprenticeship training and every apprenticeship training agreement › monitor individual apprentices to ensure that their training enables them to complete a qualification in the specified industry within a reasonable time, and › provide or procure appropriate pastoral care and support for apprentices, with regard to their age and experience and the Code. <p>For providers delivering other work-based learning, we expect to see similar approaches.</p>
<p>Disability Action Plan Strategic Intent section 3c</p>	<p>We want to see that you:</p> <ul style="list-style-type: none"> › have made and will make appropriate progress on delivering, adapting or building (as appropriate) your approach to supporting learners with disabilities › are developing and/or implementing an approach that is consistent with best practice as described in the Kia Ōrite Toolkit › are gathering and will gather clear, relevant and sufficient evidence about your progress › have applied and will apply that evidence appropriately to inform your continued approach › will undertake sufficient and appropriate activities to adequately develop or implement (as appropriate) your approach to supporting learners with disabilities and meaningfully remove barriers for learners with disabilities › for new organisations building approaches from scratch, we expect your immediate next steps to include the critical implementation steps described in our DAP Guidance, and for you to be establishing an approach to supporting learners with disabilities within your first year › have appropriate allocation of responsibility for progress in your organisation on your approach to supporting learners with disabilities, and › are making information about your approach to supporting learners with disabilities readily accessible to the public, including a range of learners.

<p>Research-related activities</p> <p>Strategic Intent section 4</p>	<p>This section is only required for organisations receiving funding from the Performance-Based Research Fund, but your description should include all research-relevant activity however it is funded.</p> <p>We want to understand your role in the New Zealand research system, including:</p> <ul style="list-style-type: none"> › your institutional strengths and specialisations in fundamental research activity, research-led teaching and postgraduate provision › how external research funding will support your research activities, and › your proposed research outcomes and impacts, how you will measure them, and how you will navigate potential barriers and obstacles to achieving them. <p>We also want to understand what activities you will undertake as part of this role, the steps you will take to implement those activities, and how you will evaluate them. The types of activities should include (as relevant):</p> <ul style="list-style-type: none"> › exploring the distinct contributions of Mātauranga Māori and Pacific research to national and global challenges and scholarship › research workforce development and strategies to increase research intensity, including increasing externally funded research activity › approaches to industry collaboration, knowledge transfer and research commercialisation › engagement with end-users, including industries and employers, iwi, and communities, and › international collaborations and partnerships, regional and national collaborations with industry, public research organisations (PROs), and other tertiary education organisations (TEOs) in the broader science, innovation and technology sector.
<p>Responding to the TES</p> <p>Strategic Intent sections 2, 3, 4 and 5</p>	<p>Earlier sections will have included much content relevant to giving effect to the priorities in the Tertiary Education Strategy (TES); this section is an opportunity to describe anything additional. You do not need to duplicate information from previous sections where relevant activities have already been described (for example, we expect Section 2 will align with Priority 4 <i>Integration and Collaboration</i>, Section 3 with Priority 1 <i>Achievement</i> and Priority 3 <i>Access and Participation</i>, and Section 4 with Priority 2 <i>Economic Impact and Innovation</i> and Priority 4 <i>Integration and Collaboration</i>). These sections will be included in our assessment of how you give effect to each priority. If there are other activities relevant to these priorities that you have not covered earlier, describe them here.</p> <p>Across your Plan, we will be looking for information that gives us confidence you will make a meaningful contribution to the TES priorities that are relevant for your organisation, your learner cohorts and your mission and role. We want to see that you understand the priorities that are relevant to your organisation and are building responses to them into your planning. This should be evident in your leadership, strategy and policies, as well as the programmes you create and deliver.</p>
<p>Delivering programmes and activities and responding to investment priorities</p> <p>Strategic Intent section 6</p> <p>Mix(es) of Provision</p> <p>MoP changes template</p> <p>Corrections provision</p> <p>Subcontracting Register</p>	<p>This section includes two subsections:</p> <ul style="list-style-type: none"> › Summary: a narrative description of your provision (if you are submitting a Strategic Intent), including investment priorities and significant changes you are making to your pattern of provision, and › Details: your detailed Mix(es) of Provision (for all providers), and related specific requirements/templates (where relevant). <p>They both focus on provision (programmes, eg, qualifications and micro-credential delivery) rather than the activities and initiatives described in earlier sections.</p> <p>We want to understand how your mission and role is operationalised through the specific programmes and activities you will deliver. Significant strategic changes to your mission and role should be appropriately reflected here in changes to your provision, and vice versa. We want to be confident that you:</p> <ul style="list-style-type: none"> › have a sustainable plan for fulfilling your mission and role through your programmes and activities › contribute appropriately to the network of provision, and have made appropriate changes (if any) to your provision that are consistent with your mission and role and your contribution to the network of provision › will be able to successfully deliver your proposed programmes and activities given past delivery levels and educational performance › have provided accurate information about all your planned programmes and activities, including those undertaken through a subsidiary, any subcontracting arrangements, and any delivery to learners in the care of the Department of Corrections › are responding appropriately (for your organisation) to the targeted priorities in Plan Guidance and Supplementary Plan Guidance (published in June), and › will improve the performance of all learners, in particular those under-served.

We want to understand any significant changes you have made since your last Plan, as well as any changes you intend to make and how those changes are consistent with your mission and role during the term of your Plan. We will need to see an explanation for each proposed change – for example, you might be responding to evidenced stakeholder needs or you might be replacing existing similar provision. When discussing intended changes or changes made since your last Plan, include:

- › a regional breakdown of your provision
- › new or changed provision, including:
 - › qualifications and programmes offered – new offerings and discontinued provision (include the qualification/programme name)
 - › changes to the regional breakdown of provision – how this has changed since your last Plan and what changes you intend to make over this Plan period. Highlight any changes to the geographic regions that specific programmes are delivered in. This includes changes to where existing programmes are delivered, where you will start delivery in a new region, or where you will close any programmes in a particular region
 - › significant changes in the volume of equivalent full-time students (EFTS) for specific provision (include the proposed EFTS)
 - › changes in the modes of delivery (eg, extramural versus face-to-face delivery)
 - › movement away from provision of investment priorities and/or increased provision that is not an investment priority, and
 - › changes to provision of investment priorities – how they have changed since your last Plan and what changes you intend to make during this Plan period.

We will consider how these changes might affect your performance, the network of provision, and the overall provision of investment priorities.

Where we provide funding for a priority area, you should use funding in that area and not significantly reallocate it to other provision without prior approval.

Outcomes and measures
Strategic Intent section 7
Educational Performance
Indicator Commitments

For many providers, Educational Performance Indicator Commitments (EPICs) form a substantial part of your Plan’s performance measures. EPICs should be achievable and reflect your consideration of the cohorts and programme represented. You should consider information provided in Plan Guidance about our expectations of sector performance, and the contribution that your performance makes to it.

Your Strategic Intent may contain more detailed commentary about the outcomes you are aiming for, the performance commitments that will indicate progress towards those outcomes, and how you have set your commitments. You may have included information about expected outcomes and non-EPI-based performance commitments in earlier sections of your proposed Plan (eg, learner success). We will include this information in our assessment of your performance commitments.

We will be assessing existing EPICs based on previous information provided to us. If you already have approved EPICs that cover 2027 investment, you do not need to submit new ones unless you want to update them. If your EPICs do not cover 2027 (ie, they cover 2024–26), you need to provide updated EPICs using the template provided.

We expect your performance commitments (including EPICs and other commitments, along with the rest of your Plan and your past delivery and performance) to be:

- › relevant: provide sufficient information about your progress towards your proposed outcomes
- › complete: cover all significant programmes and activities (and dimensions of these) that you intend to undertake
- › designed to give clear evidence about the quality of all significant programmes and activities you intend to undertake and how you will measure your performance against the proposed outcomes
- › achievable in relation to your past performance and intended activities
- › representative of a sufficient contribution to our expectations of the sector’s performance
- › representative of an appropriate improvement on your past performance (with reference to your previous commitments and/or minimum commitments, where applicable), particularly with respect to outcomes for under-served learners), and
- › be monitored appropriately to enable observed results to inform further action.

For larger providers, your regular engagement with your Relationship Manager should help to inform your EPICs if you need to submit an updated template.

High quality performance commitments help give us confidence in your capability to deliver on your proposed Plan and in your ability to continue improving outcomes.

<p>Financial information Strategic Intent section 8</p>	<p>We may ask for additional information about your organisation’s financial performance, including forecast financial statements, capital asset management information (for TEIs), and any other information needed to fairly reflect your forecast financial operations and financial position – eg, information about subsidiaries for which you have residual liability. We may use this, and information we already have, to assess whether your organisation is likely to have the financial ability to deliver on its Plan and is meeting the appropriate standards.</p>
<p>Additional requirements Strategic Intent section 9</p>	<p>The specific criteria we will assess these sections against vary for each requirement and are detailed below and in the <i>Plan Gazette</i> notice.</p> <p>Tertiary education institutions (TEIs)</p> <p>For audit purposes, any performance commitments made in your Plan, including all EPICs, must also be included in your Statement of Service Performance (SSP).</p> <p>Your proposed Plan must include a forecast SSP to enable you to report in your annual report on your performance. The content of your SSP, and other strategic documents should align with your Plan. Your Plan must also reflect any TEI outcomes frameworks agreed with us, and include forecast financial statements.</p> <p>We will assess whether you meet the expectations in the <i>Plan Gazette</i> regarding including a forecast SSP in your proposed Plan which must:</p> <ul style="list-style-type: none"> › be prepared in accordance with Generally Accepted Accounting Practice, including reporting costs summarised by key output classes/areas › reflect the full scope of your activities › focus on your outputs/services, and › include measures and evidence about the quality of these outputs/services. <p>Wānanga</p> <p>For wānanga, we will assess how your activities (other than those activities that contribute towards the Government’s priorities set out in the TES) support the functions and purposes of the wānanga.</p> <p>For wānanga receiving funding from the Ngā Whare Wānanga Allocated Fund, we will assess how you will deliver initiatives and activities (not covered by funding for delivery) related to the characteristics set out in section 398D of the Act.</p> <p>Work-based programmes and activities</p> <p>We want to be confident that:</p> <ul style="list-style-type: none"> › you have appropriate and sufficient industry support for your proposed Plan › you have appropriate and relevant systems and process in place to support the delivery of your Plan, and › any new provision is appropriate within the network. <p>TEOs receiving the Performance-Based Research Fund</p> <p>We will assess how well your participation in the research system meets the expectations set in Plan Guidance.</p> <p>TEOs with identified performance issues</p> <p>If you have had quality assurance issues identified (including Category 3 or 4 External Evaluation and Review (EER) assessments and/or other activities through the New Zealand Qualifications Authority), we will consider whether and to what extent you have provided a robust plan to address identified issues and given us confidence that your learners will be appropriately supported.</p> <p>If we have concerns about your educational performance, we will consider whether and to what extent you have adequately addressed these concerns in your proposed Plan or other improvement plan, and given us confidence that performance will improve.</p>

Appendix A: Detailed performance information from 2017 to 2024

These trends have informed our performance expectations. For details see pp. 29–34.

At degree level, we expect providers to address the discrepancy between the high rates for early indicators (first-year retention and course completions) and the lower-than-expected qualification completions.

Figure 1: First-year retention rates, Level 7 degree

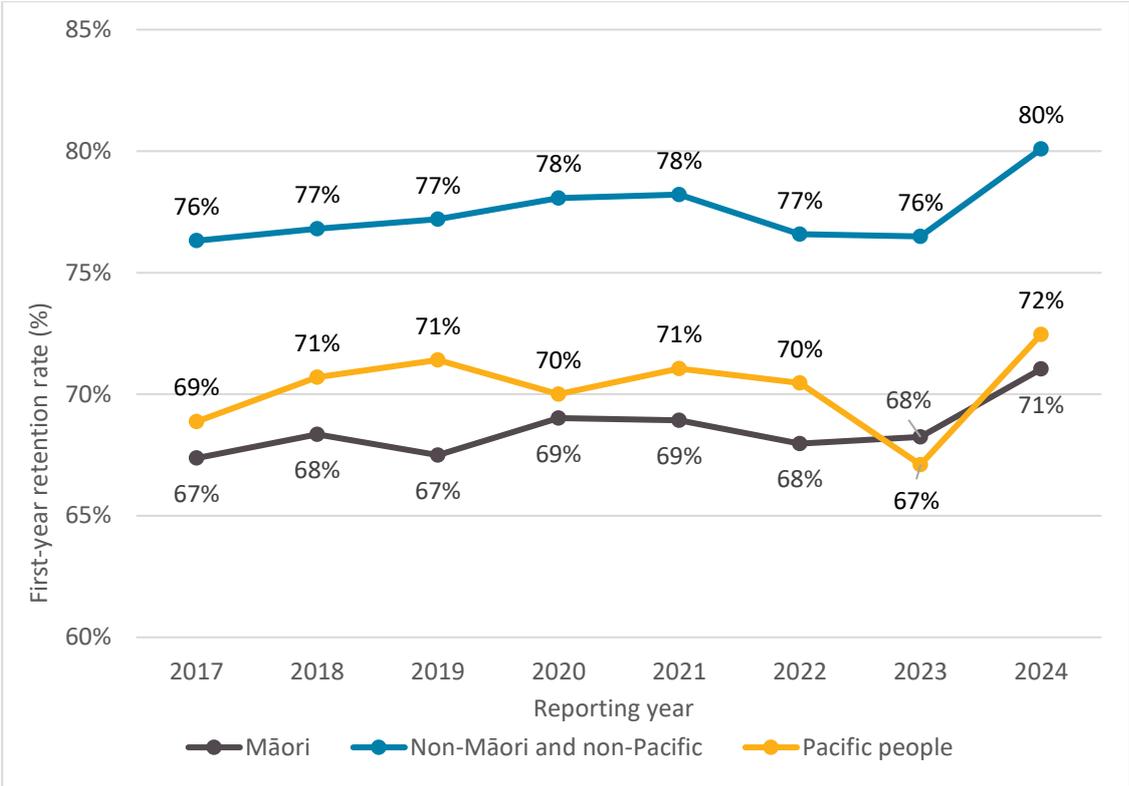


Figure 2: Course completion rates, Level 7 degree

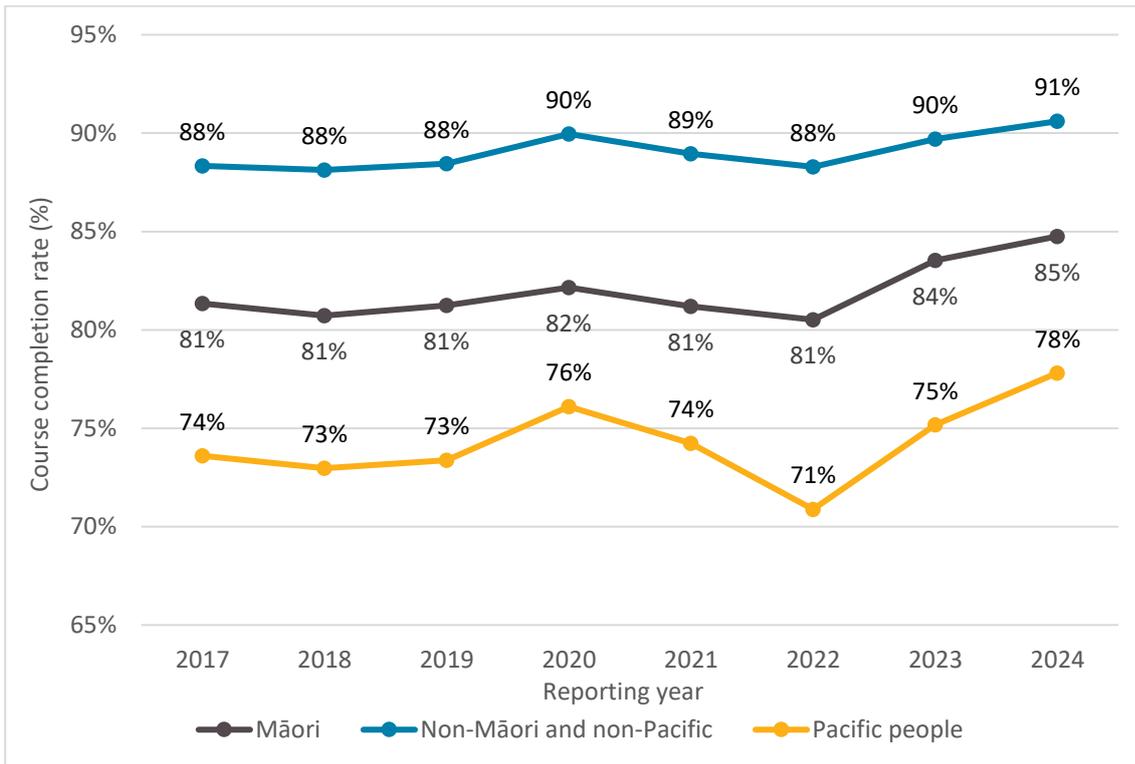
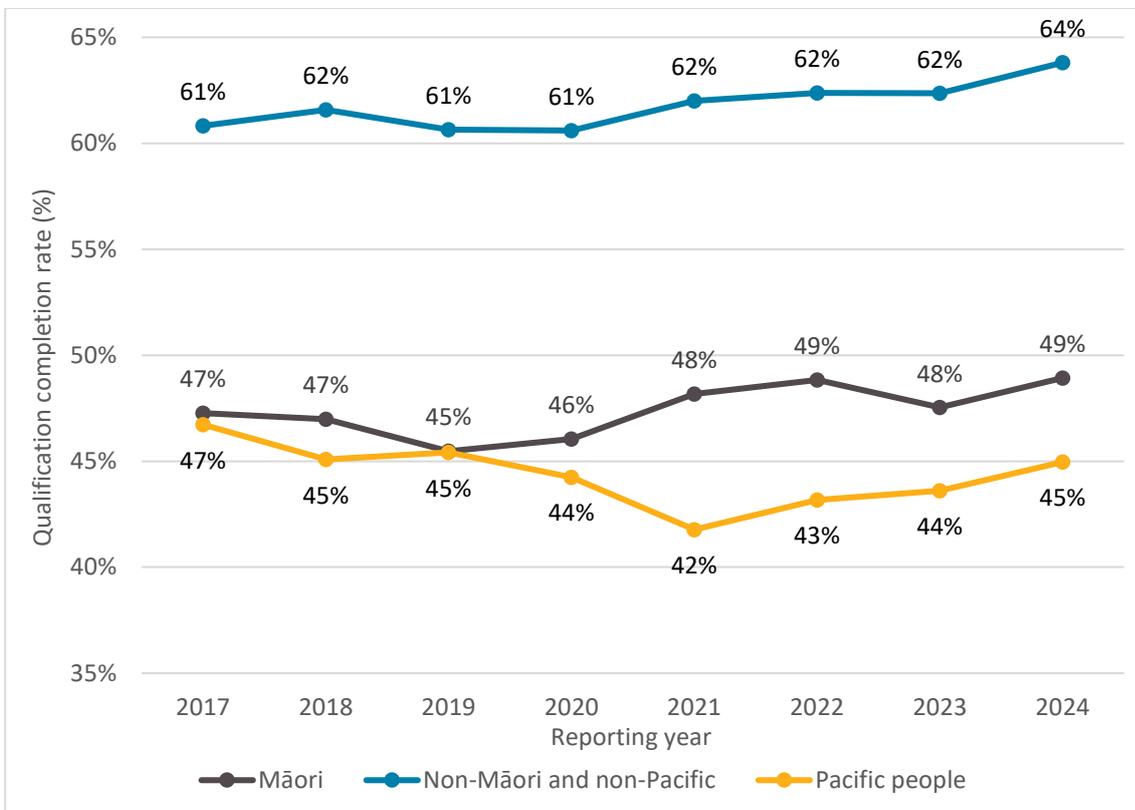
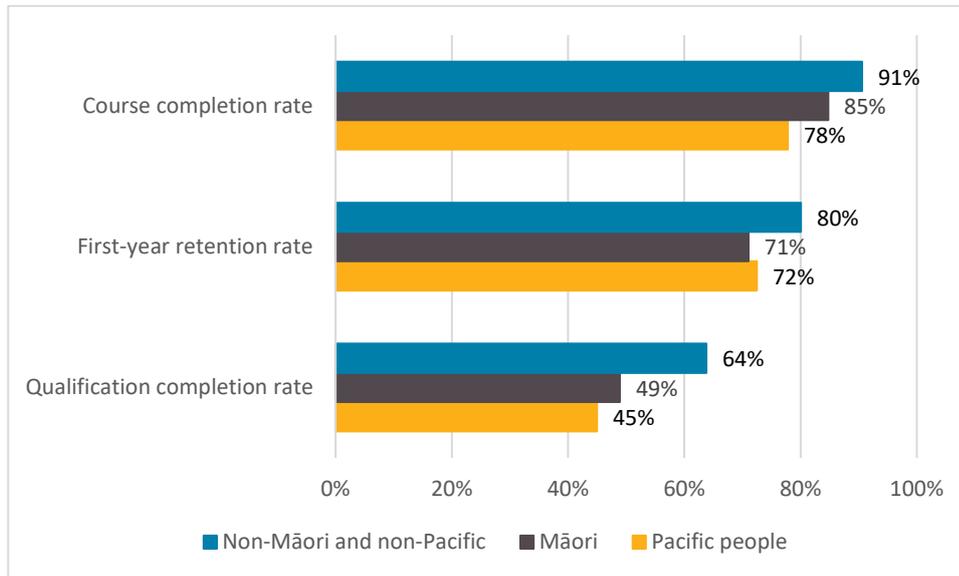


Figure 3: Qualification completion rates, Level 7 degree



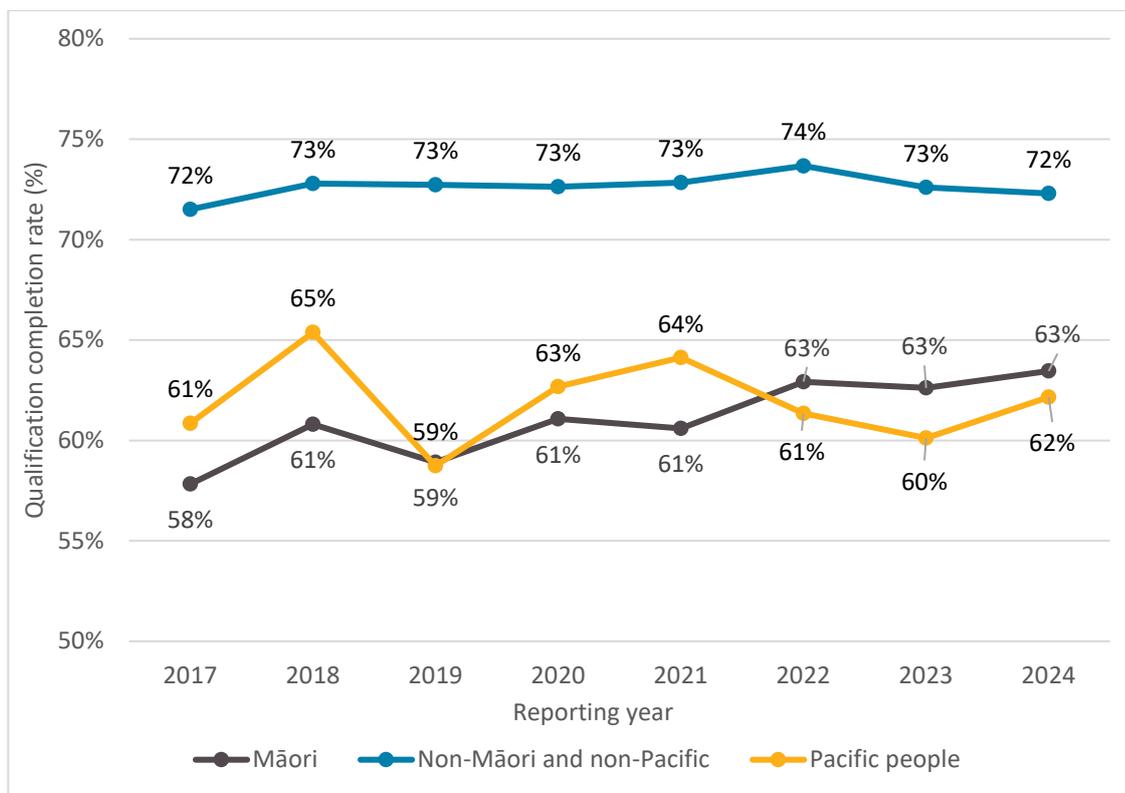
The key areas of focus are addressing achievement disparity between learner groups and improving qualification completion rates.

Figure 4: Level 7 degree, achievement of different learner groups, 2024



At Levels 8–10, the key focus is addressing achievement disparities between learner groups.

Figure 5: Qualification completion rates, Levels 8–10

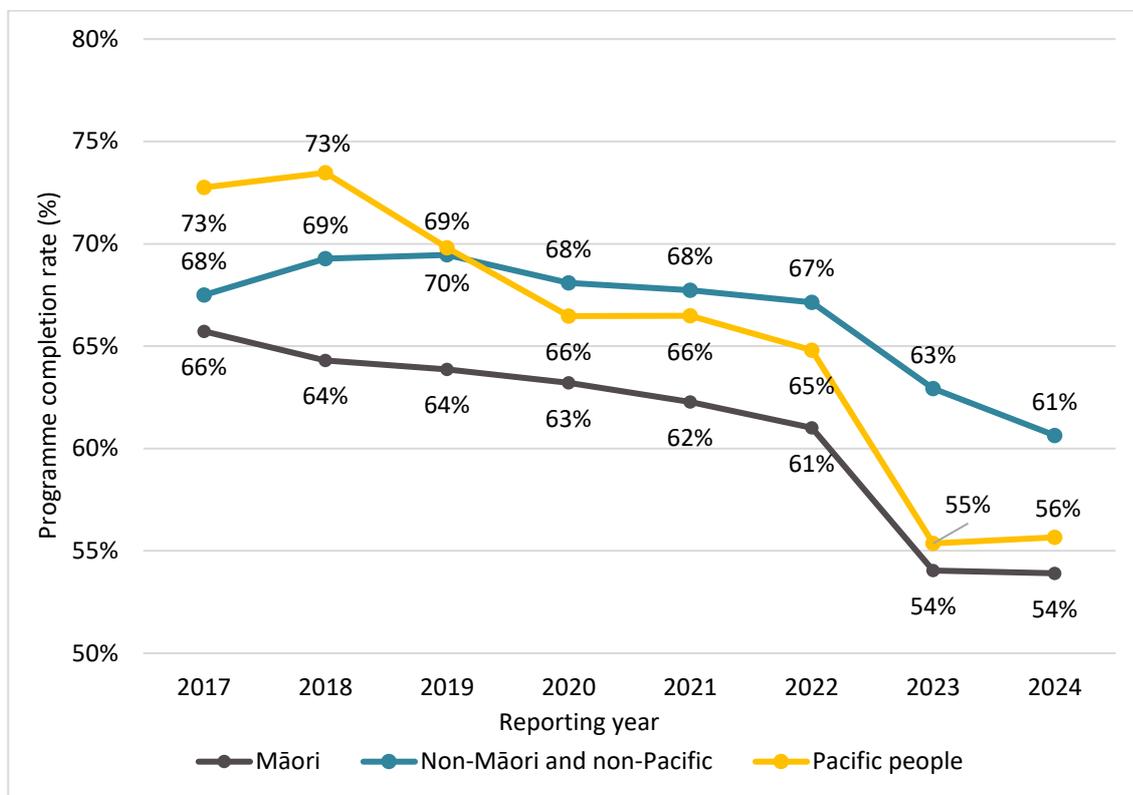


In work-based vocational education, programme completions were signalled for immediate attention last year. Overall, the declines appear to be levelling off, except for apprenticeships. We expect to see a marked improvement, accompanied by a reduction in the gap between different learner groups.

Credit achievement rates are impacted by the increases in participation. A large intake of new students (as experienced in 2020 and 2021) reduces the overall completion rates as apprenticeships (and other longer programmes) generally have the most achievement in the later stages.

Programme completion rates are affected by learners moving from transitional industry training organisations to new organisations (in 2021–22). We expect providers to be focused on supporting learners to successfully complete their programmes and for this to be reflected in future data.

Figure 6: Programme completion rates, work-based learning Levels 1–7



The completion rate for apprenticeships has reduced again, and the achievement gap between different learner groups is worse than for work-based provision overall.

Figure 7: Programme completion rates, apprenticeships only

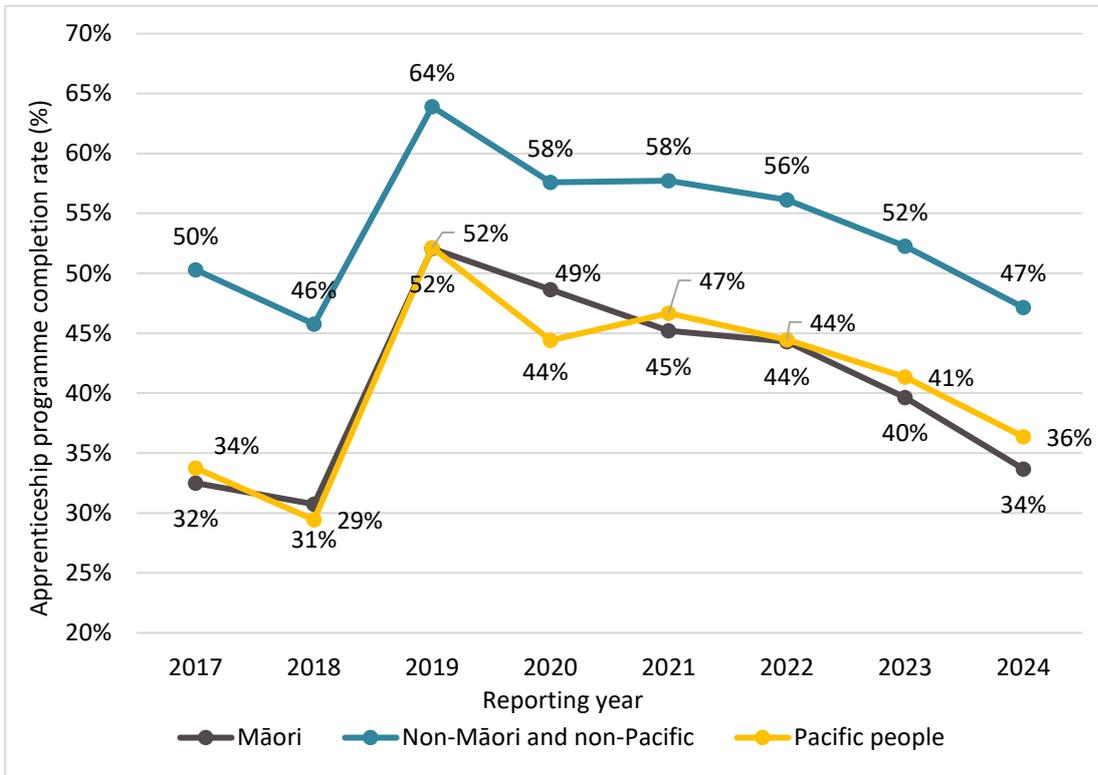
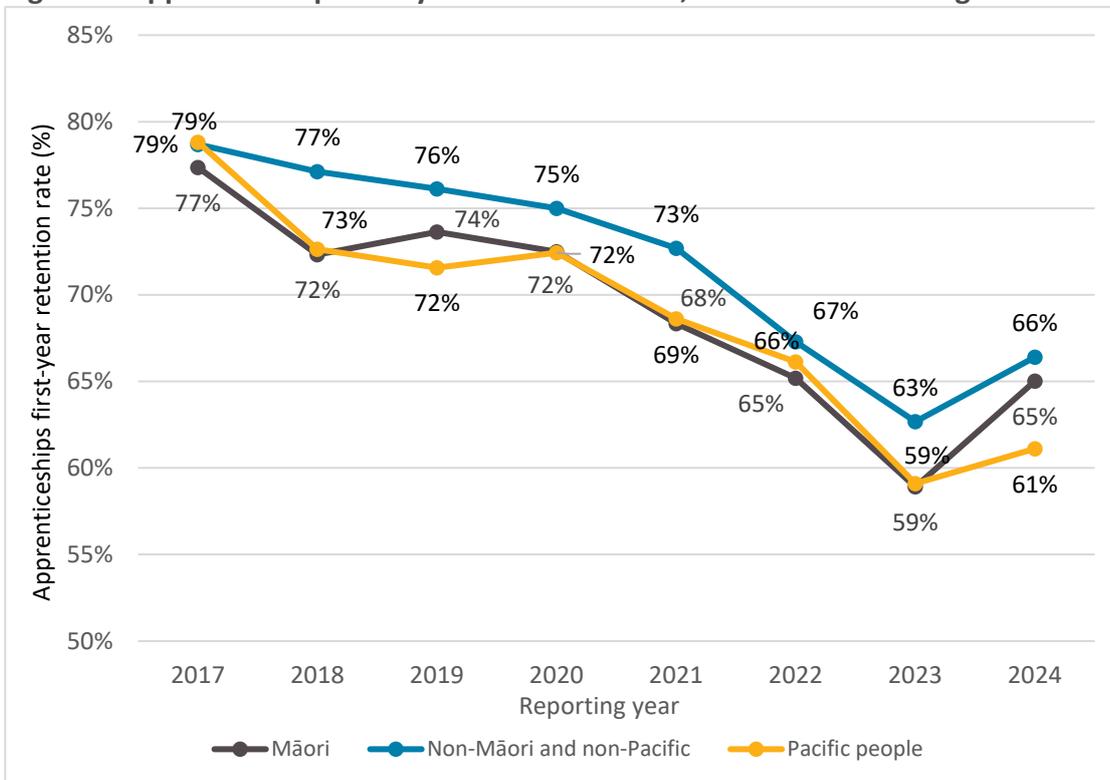
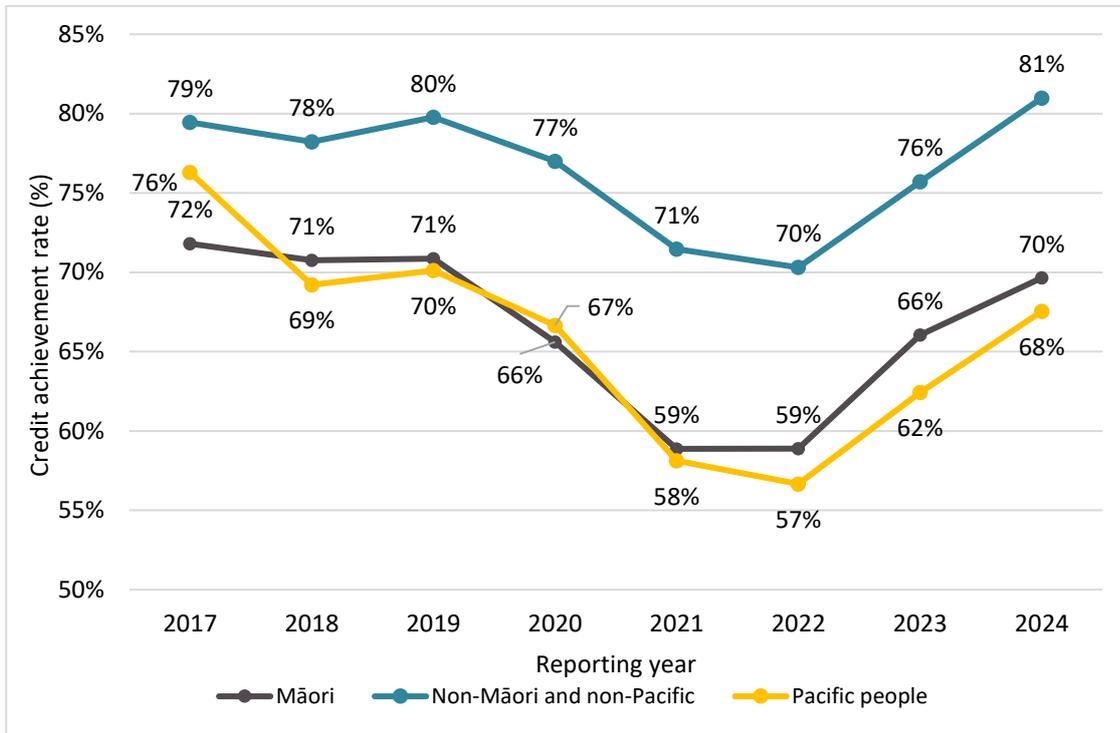


Figure 8: Apprenticeships first-year retention rates, work-based learning Levels 1–7



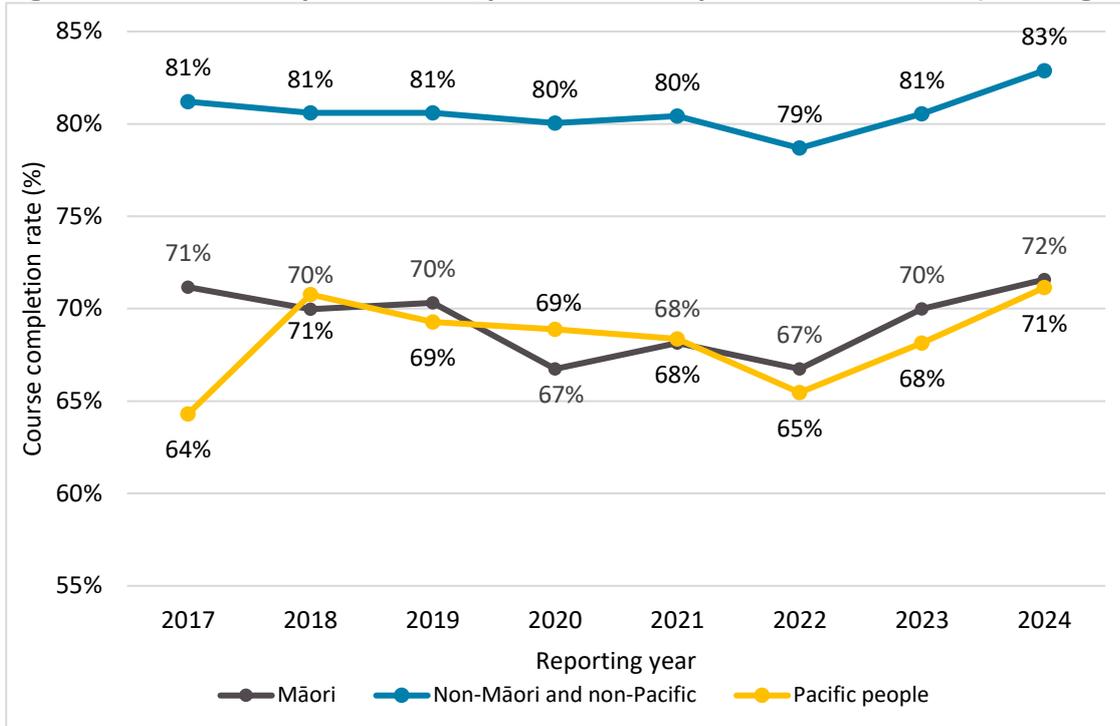
Work-based learning credit achievement rates are encouraging but the achievement gap continues to require attention.

Figure 9: Credit achievement rates, all work-based learning Levels 1–7



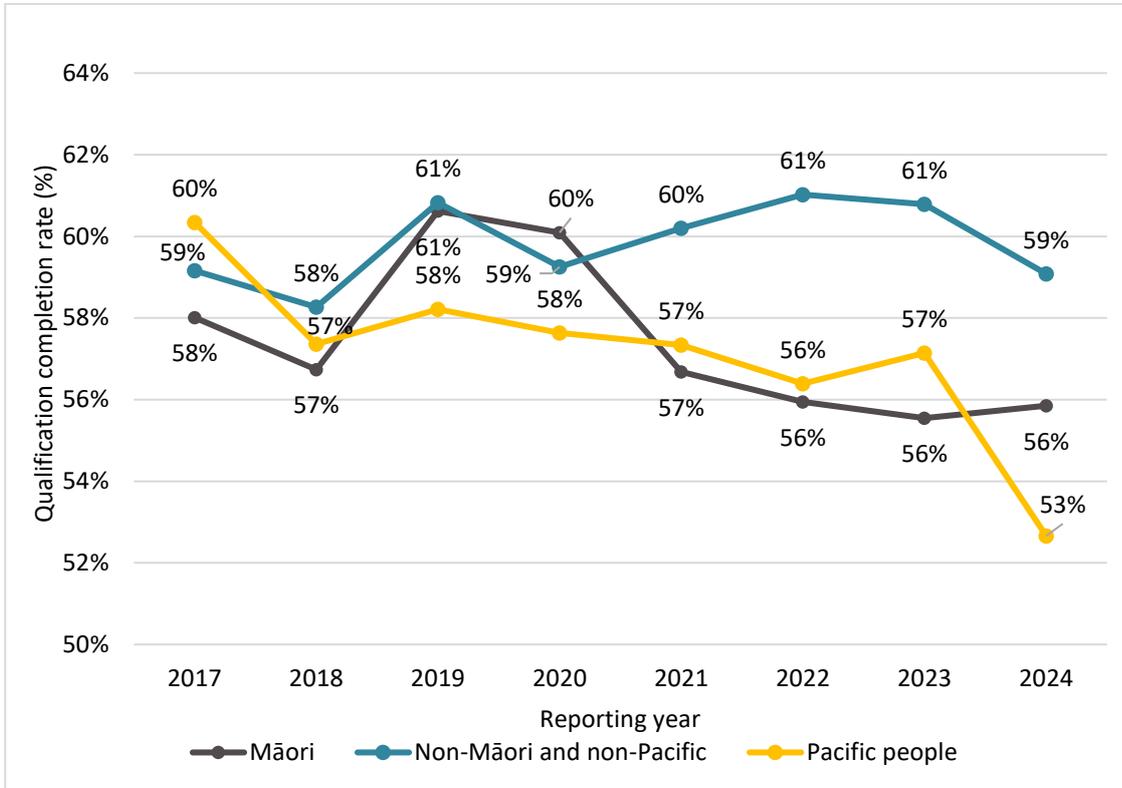
In provider-based vocational education, we expect outcomes for Māori and Pacific learner groups to continue to move closer to the rates for non-Māori and non-Pacific learners.

Figure 10: Course completion rates, provider-based provision Levels 3–7 (non-degree)



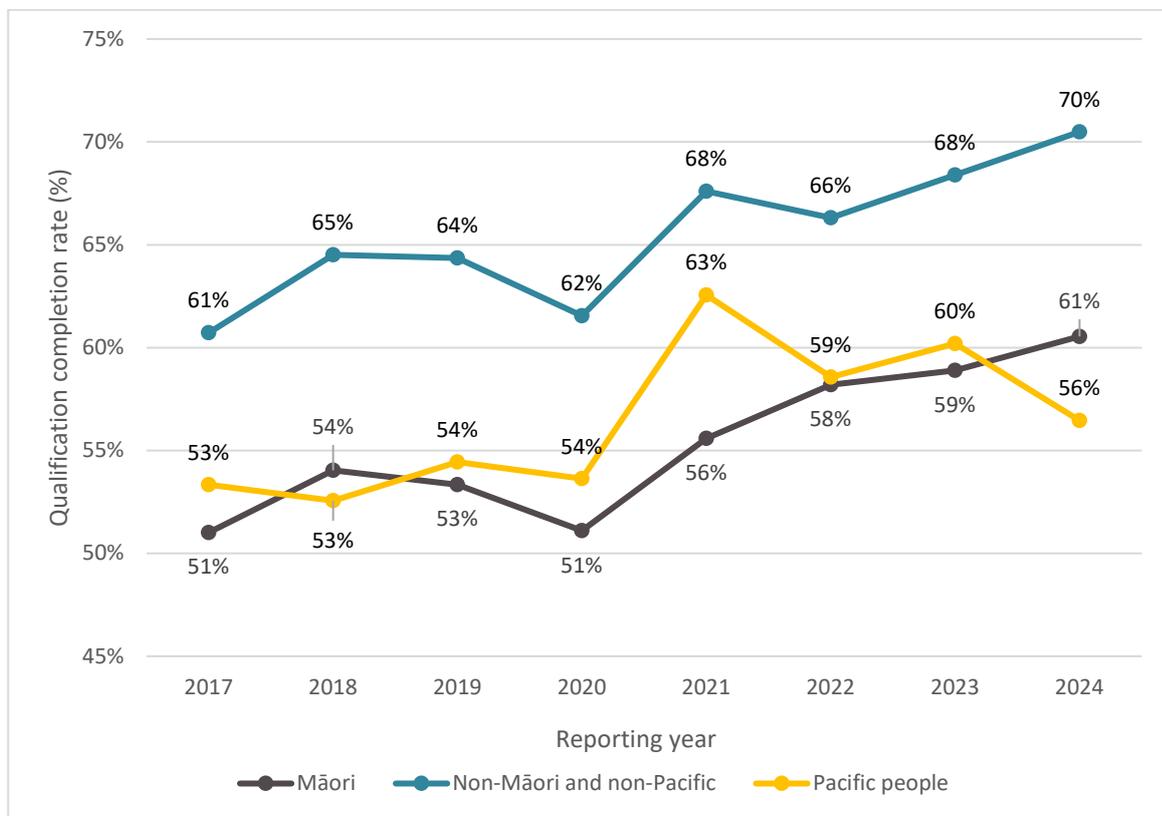
For this provision, qualification completions declined further in 2024. Providers should maintain and improve course completions (and retention) and ensure these result in increased qualification achievement rates.

Figure 11: Qualification completion rates, provider-based provision Levels 3–7 (non-degree)



While 2024 saw overall increases in Youth Guarantee qualification completion rates, the reduction for Pacific learners and the lower achievement rate for Māori must be addressed.

Figure 12: Qualification completion rates, Youth Guarantee fund



For Youth Guarantee, we apply the published minimums.

The current minimums are:

Level	Course completion	Qualification completion	Progression
Level 1	55%	40% (for Levels 1 and 2 combined)	40%
Level 2	60%		35%
Level 3	70%	60%	35%

At Levels 1–2, 2024 saw a significant uptick in course completions. We expect to see this reflected in higher qualification completions in 2025. However, improvements are still required for Māori and Pacific peoples.

Figure 13: Course completion rates, DQ Levels 1 and 2

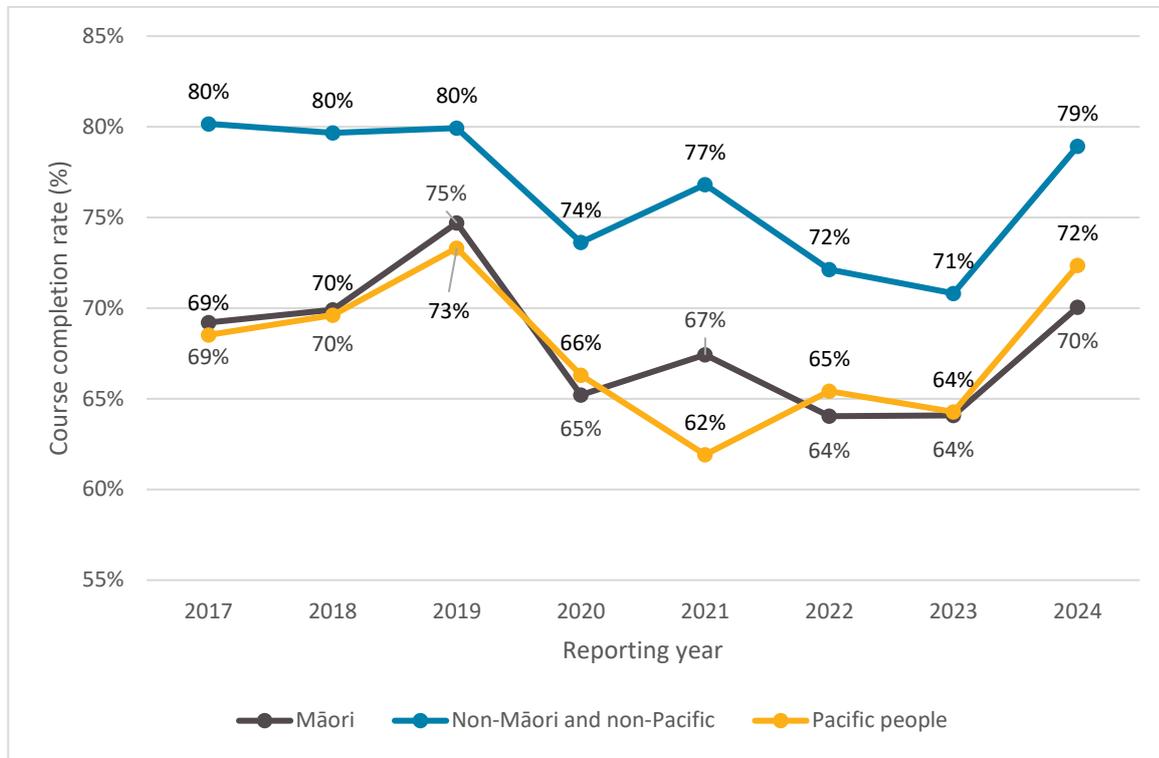
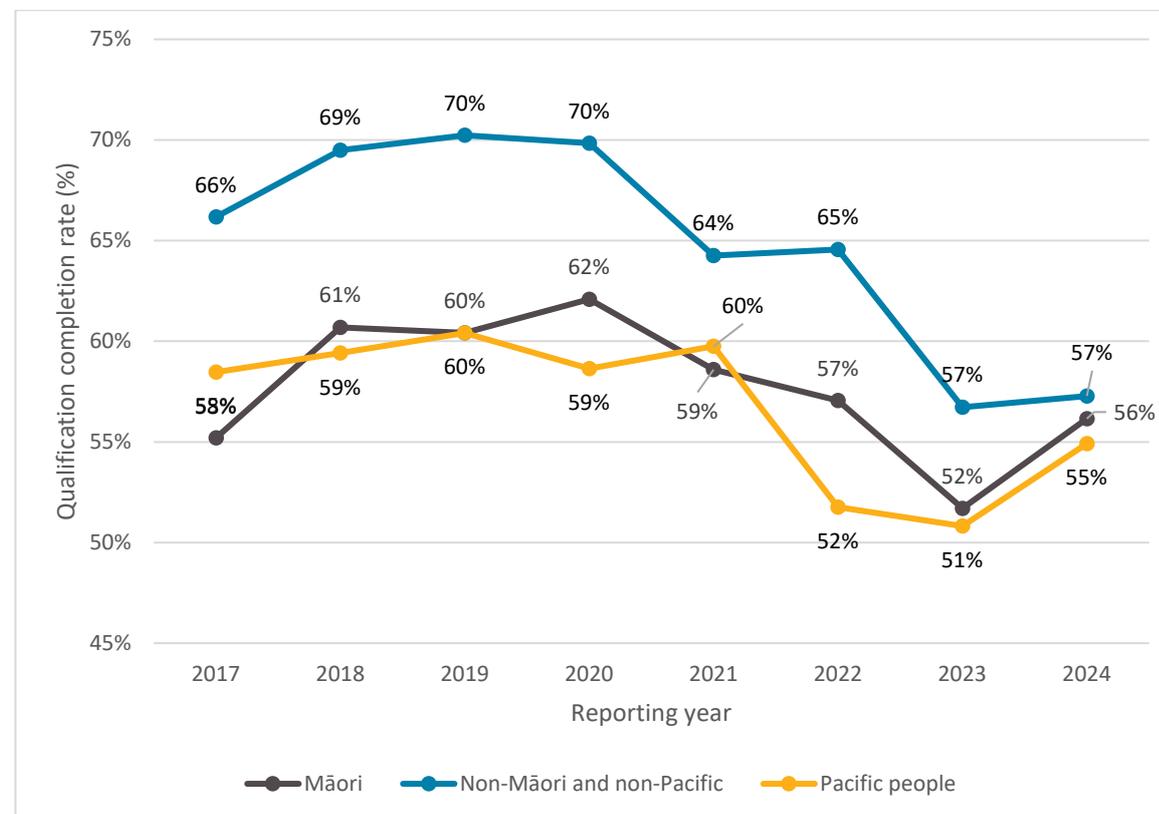


Figure 14: Qualification completion rates, DQ Levels 1 and 2



Appendix B: Sector-specific higher education targeted priorities

Sector	Approach to growth
Science, Technology, Engineering and Maths (STEM)	<p>STEM provision remains a Government priority; however, our investment decisions will be based on positive learner achievement. We will not grow investment where we cannot see good outcomes for learners.</p> <p>The science and technology sector covers a wide range of roles, some of which overlap with our priorities for food and fibre, and construction and infrastructure. We will consider provision a priority where it supports other areas of priority investment, for example agri-tech and med-tech.</p> <p>Workforce demands span STEM disciplines including:</p> <ul style="list-style-type: none"> › software engineering (eg, safety-critical software, signal processing, autonomous operations) › avionics/electronic engineering (eg, remote sensing systems, communication systems, radar engineering) › mining and advanced minerals science, geothermal science and engineering › test and evaluation/quality assurance › education relevant to the space sector, eg, rocketry › education in areas of existing educational strengths (eg, biotechnology) that will also support maturing the domestic sector › technology, specifically growing graduates with skills in the latest technology, including artificial intelligence (AI) and machine learning, and › engineering (relevant providers should talk to their Relationship Manager about their engineering provision and how it will meet sector needs).
Health	<p>We work closely with Health New Zealand Te Whatu Ora (Health NZ) and will prioritise provision in line with the Health Workforce Plan and Mental Health and Addiction Workforce Plan. We will continue to work directly with providers delivering the key skills needed for the health workforce.</p> <p>Although there is a continued need for growth in the health workforce education pipeline to support New Zealand’s healthcare needs, the health sector has finite capacity to support the clinical placements required for additional enrolments for some workforces and/or regions. If you want to grow existing health education programmes for any programme, including clinical placements, talk to us first. We will ask for evidence of engagement with Health NZ and for their confirmation of placement capacity for any new enrolments before we approve plans that increase health education enrolments. Funding existing provision may depend on the specific region or level of study, and whether we can see it will meet a currently unmet need. This applies to all levels of provision, including postgraduate and graduate-entry.</p> <p>For nursing specifically and in some other cases, we will need Health NZ’s confirmation of capacity before we can approve plans that increase health education enrolments.</p> <p>We are looking for provision that supports:</p> <ul style="list-style-type: none"> › transition between health professions (including moving to advanced or extended scopes of practice within a profession, gaining registration in a different profession, or staircasing options from non-regulated to registered professions) › part-time learning options and the ability to earn while you learn › flexible and innovative learning delivery which may also include simulation or blended learning › learning pathways that build on existing experience › learning in regional areas to deliver skills locally › diversifying the workforce › student retention and course completion (eg, via joint first- and subsequent-year courses to enable students to change their major from one health profession to another). <p>For social work going forward, we will prioritise funding for delivery of the three-year Bachelor of Social Work recently accredited by the Social Worker Registration Board (SWRB) over the four-year programme, consistent with our wider priorities for health provision.</p>
Teacher Education	<p>We are seeking growth in initial teacher education (ITE) (provision that leads to teacher registration) for early childhood, primary and secondary education. For a full list of qualifications that will lead to registration, see the Teaching Council.</p>

For ITE we are interested in innovative delivery models that support practice-based initial teacher education,¹ where the workplace is the central base for fully integrated teacher learning throughout the programme. We will prioritise practice-based ITE over provider-based ITE provided there are good learner outcomes. We would actively encourage movement of existing provision towards practice-based ITE provision.

For secondary ITE, we want to see overall growth in graduates, and growth that supports subject areas with the greatest demand:

- › science, technology, engineering and maths
- › te reo Māori.

¹ Practice-based ITE is where the workplace (school or early childhood education [ECE] service) is a central site for teacher learning, with teacher learning being undertaken in the workplace continually throughout the programme. There are a variety of ways this can be configured across programmes.

Food and Fibre

The food and fibre sector is critical to New Zealand's economy. We know that this sector is focused on attracting and retaining key skills essential to supporting its industries.

We will prioritise provision that supports skill development, including:

- › industry-specific specialist qualifications, for example, agricultural science and agri-tech, biotech, sustainability, aquaculture, biosecurity, forestry science and viticulture
- › those that have a high impact on productivity and profitability, for example environmental management, agricultural science, agribusiness and food technology.

We are interested in provision that provides clear career progression pathways and skill development that strengthens the education pipeline into New Zealand's food and fibre industry. This includes provision that targets attracting and retaining learners for this sector who may not have otherwise engaged in higher education.

Construction and Infrastructure

There are significant projects planned for New Zealand that will need graduates with skills in construction and infrastructure, and the sectors that enable these. We will look to support provision that is connected to these projects and delivers work-ready graduates. There is a particular need for sector-specific education that supports large-scale, complex project management, engineering and technological advancement.

Accounting and Finance

Due to a skills shortage for accounting and financial professionals we will look to maintain provision levels for CA ANZ (Chartered Accountants Australia & New Zealand) accredited qualifications, with a focus on supporting learners in accredited qualifications to complete them and encouraging learners undertaking commerce degrees to consider majoring in accounting. Where there is clear evidence of learner demand we will grow our investment.

See the [CA Program academic entry requirements and CA ANZ list of accredited courses](#).

Appendix C: Vocational education targeted priorities

This section lists specific programmes.

Where the type of change is an **Increase**, providers must **first consider current enrolments and improvement to programme and qualification completion rates**, particularly where the current completion rate is below the performance expectations detailed in the Sector Performance section.

Manufacturing, Engineering and Logistics: including Manufacturing, Processing, Extractives and Drilling, Transport, Postal, and Warehousing

This section identifies provision that industry has indicated would benefit from a change in delivery. This may be an increase in completions, a decrease in enrolments or a change (eg, the mode of delivery).

Category	Qualification or credential	Type of change
Automotive	New Zealand Certificate in Automotive Electrical Engineering (Level 4) (3460)	Increase
	New Zealand Certificate in Automotive Engineering (Level 3) (3097)	Maintain 2024 levels of delivery
	New Zealand Certificate in Collision Repair and Automotive Refinishing (Level 3) (3008), to be replaced by two new qualifications: a) New Zealand Certificate in Automotive Collision Repair (Level 3) (4858) b) New Zealand Certificate in Automotive Refinishing (Level 3) (4859)	Replace and increase
	New Zealand Certificate in Electric Vehicle Automotive Engineering (Level 5) (3915)	Increase
	New Zealand Certificate in Heavy Automotive Engineering (Level 4) with strands in Road Transport, Plant and Equipment, Agricultural Equipment, and Materials Handling (3118)	Increase
	New Zealand Certificate in Light Automotive Engineering (Level 4) (3450)	Increase
	New Zealand Certificate in Automotive Parts and Accessories (Level 4) (5104)	New delivery sought
Engineering	New Zealand Certificate in Transport Engineering (Trade) (Level 4) (5054)	New delivery sought – preference for work-based
	New Zealand Certificate in Irrigation Technology (Level 3) (5316) – replacing 3761	Replace
Maritime	New Zealand Certificate in Domestic Maritime Operations (Restricted Limits) (Level 4) (2505)	Increase – particular focus on Northland and Marlborough
	New Zealand Certificate in Maritime Crewing (Level 3) with strands in Deck Crewing, Engineering, Passenger Services, and Superyacht Crewing (2506)	Increase – particular focus on Northland and Marlborough
	New Zealand Certificate in Maritime Operations (Level 4) with strands in Fishing, and Watchkeeping (2513)	Increase – particular focus on Northland and Marlborough
Transportation	New Zealand Certificate in Commercial Road Transport (Heavy Vehicle Operator) (Level 3) (3089)	Increase – preference for work-based
	Communicate to Improve Safety, Compliance and Performance in Commercial Road Transport (Micro-credential) (5109)	New delivery sought
	Data Collection and Analysis to Improve Performance in Commercial Road Transport (Micro-credential) (5106)	New delivery sought
	Heavy Vehicle Recovery Skills (Micro-credential) (4862)	New delivery sought – preference for work-based
	Introduction to Dispatch Operations for Commercial Road Transport (Micro-Credential) (5108)	New delivery sought – preference for work-based
	Off-road Heavy Vehicle Driving Skills (Micro-credential) (4865)	New delivery sought – preference for work-based
	Waste Transport Driver Operations and Safety (Micro-credential) (4863)	New delivery sought – preference for work-based
	Waste Transport Driver Operations and Safety Using a Left-hand Waste Collection Vehicle (Micro-credential) (4864)	New delivery sought – preference for work-based
Workplace Driver Trainer Skills for Commercial Road Transport (Micro-credential) (5110)	New delivery sought – preference for work-based	

Mining/ Quarrying	Extractive Industries Standard Operating Procedures (Micro-credential) (4848)	Increase – preference for work-based – particular focus on West Coast, Otago, Taranaki and Waikato
	Extractive Industries Site Construction and Maintenance (Micro-credential) (4849)	Increase – preference for work-based – particular focus on West Coast, Otago, Taranaki and Waikato
Manufacturing	Digital Systems for Productivity Improvement in Manufacturing (Micro-credential) (5011)	New delivery sought
Plastics	New Zealand Certificate in Plastics Engineering and Fabrication (Level 4) (5015)	New delivery sought – preference for work-based
	Onsite Polymer Welding (Micro-credential) (5013)	New delivery sought – preference for work-based
	Plastic Fabrication Workshop and Welding (Micro-credential) (5014)	New delivery sought – preference for work-based
	Plastics Acrylics Fabrication and Assembly (Micro-credential) (5012)	New delivery sought – preference for work-based
Print	Assist a Print Operator (Micro-credential) (4884)	New delivery sought – preference for work-based
	Guillotine Operations for Print Production (Micro-credential) (4861)	New delivery sought – preference for work-based
	Print Industry Foundation Knowledge (Micro-credential) (4881)	New delivery sought – preference for work-based
Textiles	Industrial Textile Fabrication On-site Installation (Micro-credential) (5074)	New delivery sought – preference for work-based
	New Zealand Certificate in Advanced Textiles (Level 4) with strands in Industrial Textiles Fabrication, and Industrial Trimming (5060) – replacing 2544	Replace
	New Zealand Certificate in Industrial Sewing (Level 3) (5081)	New delivery sought – preference for work-based

This section identifies new qualifications and credentials standard setters have developed to meet industry needs. We want providers to consider reprioritising to deliver this provision.

Category	Qualification or credential	Type of change
Engineering	Locomotive Refinishing: Paint Technology and Application (Micro-credential) (5138)	New delivery sought
	New Zealand Certificate in Passenger Ropeways Maintenance Engineering (Level 4) with optional strand in Conveyor Systems (5365)	New delivery sought
	New Zealand Certificate in Irrigation Technology (Level 4) (5317) – replacing 3762	Replace
Manufacturing	Certificate in Waste Reduction in the Workplace (Micro-credential) (5231)	New delivery sought
	New Zealand Certificate in Apparel and Fashion Technology (Level 4) (5218) – replacing 2607, 2608 and 3178	Replace
	Concepts and Principles of Total Productive Manufacturing (TPM) in the Workplace (Micro-credential) (5230)	New delivery sought
	New Zealand Certificate in Operational Excellence (Competitive Systems and Practice) (Level 3) (5250) – replacing 2998	Replace
	New Zealand Certificate in Operational Excellence (Competitive Systems and Practice) (Level 4) (5251) – replacing 2999	Replace
	New Zealand Diploma in Operational Excellence (Competitive Systems and Practice) (Level 5) (5252) – replacing 3000	Replace
	Introduction to the Energy and Chemical Industry (Micro-credential) (5298)	New delivery sought
Mining/ Quarrying	Extractive Industries Rehabilitation Operations Planning (Micro-credential) (5294)	New delivery sought
	Extractive Industries Plan and Manage Extraction Methods (Micro-credential) (5292)	New delivery sought
Food and Beverage	New Zealand Certificate in Baking (Fundamentals) (Level 3) (5319) – replacing 1841	Replace
	New Zealand Certificate in Baking (Generalist) (Level 4) (5320) – replacing 1842	Replace
	New Zealand Certificate in Baking (Trade) (Level 3) (5321) – replacing 2696	Replace
	New Zealand Certificate in Baking (Trade) (Level 4) with strands in Bread, Cake and Biscuit, Instore, Pastry and Plant (5322) – replacing 2698 and 2697	Replace

Other Processing	New Zealand Certificate in Fellmongery and Leather Processing (Level 3) (2486)	New delivery sought – preference for work-based
	New Zealand Certificate in Fellmongery and Leather Processing (Level 4) (2492)	New delivery sought – preference for work-based
	New Zealand Certificate in Dairy Processing (Level 5) with strands in Operational Leadership, and Dairy Technology (4268)	Work-based (with off-job learning support, not extramural)
	New Zealand Diploma in Dairy Processing (Level 6)	New delivery sought
Marine	New Zealand Diploma in Vessel Technology Project Management (Level 5) (5115) – replacing 3127–3	Replace
Transportation	Locomotive Refinishing: Paint Preparation, Painting Plastics and Applying Adhesive Graphics (Micro-credential) (5158)	New delivery sought
	Locomotive Refinishing: Prepare, Fill and Prime (Micro-credential) (5156)	New delivery sought
Supply Chain and Distribution	Digital Skills for Supply Chain Management (Micro-credential) (5324)	New delivery sought
	New Zealand Diploma in Supply Chain Management (Level 6) (2812)	New delivery sought
	New Zealand Certificate in Supply Chain Management (Level 5) (2811)	New delivery sought

Community, Health, Education and Social Services: including Care Services, Disability Services, Education and Education Support Services, Funeral Services, Health Services, Public Order Safety, Regulatory Services, Skin and Nail Therapy Services, Social Services, and Urban Pest Control

This section identifies provision that industry has indicated would benefit from a change in delivery. This may be an increase in completions, a decrease in enrolments or a change (eg, the mode).

Category	Qualification or credential	Type of change
ECE	New Zealand Certificate in Early Childhood Education and Care (Level 4) (2850)	Increase
	New Zealand Diploma in Early Childhood Education and Care (Level 5) (2851)*	Increase
	New Zealand Diploma in Early Childhood Education and Care (Level 6) (2852)*	Increase
Health	New Zealand Certificate in Health and Wellbeing (Peer Support) (Level 4) (2989)	Increase
	New Zealand Certificate in Health and Wellbeing (Social and Community Services) (Level 4) (2992)	Increase
	Support a Person with Fetal Alcohol Spectrum Disorder (Micro-credential) (Level 4) (5076)	Increase
	Health of the Older Person - Kaiāwhina-led Non-complex Support Plan Review (Micro-credential) (Level 3) (5038)	Increase
Youth work	Te Tiwhikete Kaiarahi Taiohi – Aotearoa (Taumata 4) (2449)	Increase

*Tertiary education organisations to evidence learner transitions into the degree-level programmes

This section identifies new qualifications and credentials standard setters have developed to meet industry needs. We want providers to consider reprioritising to deliver this provision.

Category	Qualification or credential	Type of change
Health	New Zealand Certificate in Disability Support (Level 3) (5561)	New delivery sought
	New Zealand Certificate in Disability Support (Level 4) (5562)	New delivery sought
	New Zealand Diploma in Cardiac Physiological Measurement (Level 6) (5296)	New delivery sought
	Clinical Coding (Micro-credential) (Level 5) (5380)	New delivery sought
	Foot Care Assistant (Micro-credential) (Level 4) (5191)	New delivery sought
	Health Coach Preparation (Micro-credential) (Level 4) (5275)	New delivery sought
	Ophthalmic Technician (Micro-credential) (Level 4) (5488)	New delivery sought
	Understanding Long Term Conditions (five Micro-credentials) (Level 3) (5356, 5357, 5358, 5359, 5360)	New delivery sought
	Applied Coordinated Incident Management (CIMS) (Micro-credential) (Level 4) (5342)	New delivery sought

Health New Zealand has published the [Health Workforce Plan](#) and the [Mental Health and Addiction Workforce Plan](#). These Plans highlight priorities in education and training at Levels 3 and 4 for health workers. However, given recent significant growth in health and wellbeing provision, TEC will be looking to consolidate its investment in quality provision with the best outcomes for learners. We will continue to work with Health NZ on education and training investment priorities for 2027 delivery.

People, Food and Fibre: including Dairy, Sheep and Beef, Other Livestock, Arable, Horticulture, Fishing, Seafood Processing, Winemaking, Aquaculture, Livestock Farming, Sports Turf Management, and Forestry

This section identifies provision that industry has indicated would benefit from a change in delivery. This may be an increase in completions, a decrease in enrolments or a change (eg, the mode).

Category	Qualification or credential	Type of change
Agriculture	New Zealand Certificate in Agriculture (Farming Systems) (Level 3) (2220)	Increase
	New Zealand Certificate in Agriculture (Level 3) (3869)	Increase
	New Zealand Certificate in Agriculture (Level 4) (Stranded) (2212)	Increase
	New Zealand Certificate in Pest Operations (Level 3): Rural Pest Control, Rural Pest Monitoring, and Urban Pest Control (2443)	Increase
Apiculture	New Zealand Certificate in Apiculture (Level 3) (2223)	Preference for work-based
Forestry	New Zealand Certificate in Forest Harvesting Operations (Level 3): Basic Machine Operation, Breaking Out – Cable, Landing Operations, and Tree Felling (2326)	Increase
	New Zealand Certificate in Forestry Operations (Level 3): Basic Machine Operations, Mensuration, Production Thinning, Planting, Pruning, and Thin to Waste (2334)	Increase
	New Zealand Certificate in Forestry Leadership (Level 5) (4826)	Increase
	New Zealand Certificate in Assistant Trainer (Level 4) (4825)	Increase
	Business Forestry Leadership (Micro-credential) (Level 5) (4979)	Increase
	Core Construction of Forestry Roads (Micro-credential) (Level 3) (4980)	Increase
	Core Forestry Leadership (Micro-credential) (Level 5) (4977)	Increase
	Forestry Deadman Installation (Micro-credential) (Level 3) (4981)	Increase
	Forestry Earthworks Plant Operation (Micro-credential) (Level 3) (4975)	Increase
	Forestry Foundation Skills (Micro-credential) (Level 2) (5040)	Increase
	Forestry Operations: Log Scaling (Micro-credential) (Level 4) (4925)	Increase
	Forestry River Crossing Construction (Micro-credential) (Level 3) (4974)	Increase
	Forestry Road Pavement (Micro-credential) (Level 3) (4973)	Increase
	Geotextile Installation in Forestry Infrastructure (Micro-credential) (Level 3) (4982)	Increase
	Maintenance and Rehabilitation of Forestry Roads (Micro-credential) (Level 3) (4976)	Increase
	New Zealand Certificate in Forest Industry Foundation Skills (Level 2) (4918)	Increase
Operational Forestry Leadership (Micro-credential) (Level 5) (4978)	Increase	
Horticulture	Assess and Manage Risks to Freshwater from Horticultural Production (Micro-credential) (Level 4) (5055)	Increase

	New Zealand Certificate in Horticulture Services (Level 4) (Stranded) (2674)	Increase
	New Zealand Certificate in Horticulture Production (Level 4) (Stranded) (2676)	Increase
	New Zealand Certificate in Horticulture (Level 3) (Stranded) (2678)	Increase
	New Zealand Diploma in Horticulture Production (Level 5) (Stranded) (2666)	Increase
	New Zealand Certificate in Horticulture (General) (Level 3) (2677) – replacing 2678	Decrease new enrolments
Pan-sector	New Zealand Certificate in Primary Industry Operational Skills (Level 3): Optional strands in Specialist Equipment, and Infrastructure (2215)	Increase
	New Zealand Certificate in Primary Industry Production Management (Level 5) (Stranded) (2211)	Increase
	New Zealand Certificate in Primary Industry Skills (Level 2): Optional strand in Self-Management and Employability Skills (2218)	Increase
	New Zealand Diploma in Primary Industry Business Management (Level 5) (2221)	Increase
Seafood	New Zealand Certificate in Seafood Processing (Level 3): Fish and Fish Products, Live Holding, Cleaning and Sanitation, and Seafood Logistics (3130)	Increase
	Introduction to Aquaculture (Micro-credential) (Level 2) (5036)	Increase
	Introduction to Commercial Fishing (Micro-credential) (Level 2) (5052)	Increase
	Introduction to Seafood Processing (Micro-credential) (Level 2) (5035)	Increase
Veterinary	New Zealand Certificate in Animal Healthcare Assisting (Level 4): Companion Animal Healthcare, Equine Healthcare, and Rural Animal Healthcare (4388)	Increase
	New Zealand Diploma in Veterinary Nursing (Level 6): Companion Animal Veterinary Nursing, and Equine Veterinary Nursing (4389)	Increase
Equine/Racing	New Zealand Certificate in Assistant Trainer (Level 4) (4825)	Increase
	New Zealand Certificate in Equine Skills (Level 3): Harness Racing Stable Assistant, Thoroughbred Raceday Strapper, Thoroughbred Stable Assistant, Thoroughbred Racing Track Rider, and Sporthorse Stable Assistant (2376)	Increase
Sheep/Deer/ Beef/Wool	Introduction to Shearing (Micro-credential) (Level 3) (5068)	Increase
	Shearing Essentials (Junior) (Micro-credential) (Level 3) (5066)	Increase
	Wool Handling Fundamentals (Micro-credential) (Level 3) (5067)	Increase
	Wool Pressing Skills (Micro-credential) (Level 3) (5065)	Increase
Other	Emerging Leadership in People, Food and Fibre Industries (Micro-credential) (Level 4) (5044)	Increase
Irrigation	Groundspread Nutrient Application for Primary Industry (Micro-credential) (Level 3) (4914)	Increase
	Irrigation – Full Pipe Water Measurement Device Installation and Commission (Micro-credential) (Level 5) (5004)	Increase
	Irrigation – Full Pipe Water Measurement Device Verification (Micro-credential) (Level 5) (5002)	Increase
	Irrigation – Water Measurement Telemetry System Installation and Commission (Micro-credential) (Level 5) (5003)	Increase

This section identifies new qualifications and credentials standard setters have developed to meet industry needs. We want providers to consider reprioritising to deliver this provision.

Category	Qualification or credential	Type of change
Field Hydrology	Conduct and Compile Discharge Measurement – Methods and Platforms (Micro-credential) (Level 5) (5410)	New delivery sought
	Conduct and Compile Discharge Measurement – Wading (Micro-credential) (Level 5) (5409)	New delivery sought
	Construct and Evaluate Hydrometric Rating Curves (Micro-credential) (Level 5) (5408)	New delivery sought
	Process and Analyse Hydrometric Data (Micro-credential) (Level 5) 5411	New delivery sought

Forestry	Fell Non-pine Species Trees (Micro-credential) (Level 4) (5278)	New delivery sought
	Machine-assisted Felling as a Machine Operator (Micro-credential) (Level 4) (5279)	New delivery sought
	Machine-assisted Felling as a Tree Faller (Micro-credential) (Level 4) (5277)	New delivery sought
	Manage a Worksite for a Tree Operation (Micro-credential) (Level 4) (5280)	New delivery sought
	Prepare for and Execute Machine-Assisted Felling of Small Trees as a Tree Faller (Micro-credential) (Level 3) (5281)	New delivery sought
	Plan and Fell Trees Using Advanced Techniques in a Tree Felling Operation (Micro-credential) (Level 4) (5282)	New delivery sought
Seafood	New Zealand Certificate in Seafood with strands in Aquaculture, Seafood Processing and Commercial Fishing (Level 5) (3129)	New delivery sought

Services: including Advisory Services, Aviation, Cleaning Services, Business Services, Contact Centres, Financial Services, Hospitality, Local Government, Real Estate, Retail, Security Services, State Sector, and Tourism and Travel

This section identifies provision that industry has indicated would benefit from a change in delivery. This may be an increase in completions, a decrease in enrolments or a change (eg, the mode).

Category	Qualification or credential	Type of change
Business	New Zealand Certificate in Business (Accounting Support Services) (Level 4) (2455)	Maintain 2024 levels
	New Zealand Certificate in Business (First Line Management) (Level 4) (2456)	Increase
	New Zealand Certificate in Business (Introduction to Team Leadership) (Level 3) (2453)	Increase
	New Zealand Certificate in Business (Small Business) (Level 4) (2457)	Increase
Cookery	New Zealand Certificate in Cookery (Level 4) (2101)	Increase – preference for face-to-face delivery (not extramural)
	New Zealand Diploma in Cookery (Advanced) (Level 5) with strands in Cookery, and Patisserie (2102)	Increase – preference for face-to-face delivery (not extramural)
Food and Beverage	New Zealand Certificate in Food and Beverage Service (Level 4) (2105)	Increase
Security	New Zealand Certificate in Security (Foundation) (Level 3) (3642)	Increase – work-based (with off-job learning support, not extramural)
Tourism	New Zealand Certificate in Tourism (Level 4) (2202)	Increase
Travel	New Zealand Certificate in Travel (Level 4) (2204)	Increase
Pan-sector	Core Service Sector Skills (Micro-credential) (Level 3) (5101)	Increase
	New Zealand Certificate in Service Sector Skills (Level 3) (5025)	Increase

This section identifies new qualifications and credentials standard setters have developed to meet industry needs. We want providers to consider reprioritising to deliver this provision.

Category	Qualification or credential	Type of change
Business	New Zealand Certificate in Leadership (Level 4) (5306)	New delivery sought
Tourism	New Zealand Certificate in Hospitality (Level 3) (4366)	New delivery sought

Creative: including Creative, Technology, Entertainment, Hairdressing and Barbering, Makeup Artistry, Skincare, Journalism, Radio and Television Broadcasting, Gambling, and Sports & Recreation

This section identifies provision that industry has indicated would benefit from a change in delivery. This may be an increase in completions, a decrease in enrolments or a change (eg, the mode).

Category	Qualification or credential	Type of change
Hairdressing	New Zealand Certificate in Hairdressing (Professional Stylist) (Level 4) (2413)	Increase
	New Zealand Certificate in Commercial Barbering (Level 4)	Increase
IT	New Zealand Diploma in Cybersecurity (Level 6) (3837)	Increase – work-based or provider-based only (not extramural). Particular focus on Waikato and Wellington
	New Zealand Diploma in IT Infrastructure (Level 6) (4129)	Increase
	New Zealand Diploma in Software Development (Level 6) (2604)	Increase
	New Zealand Diploma in Information Technology (Level 5) (2596)	Increase – renamed from New Zealand Diploma in Information Technology Technical Support
Outdoor	New Zealand Certificate in Outdoor and Adventure Education (Multi-skilled) (Level 4) (3765)	Increase
	New Zealand Certificate in Outdoor Leadership (Level 4) (3662)	Increase
	New Zealand Diploma in Outdoor and Adventure Education (Multi-skilled) (Level 5) (3766)	Increase
Exercise	Exercise Fundamentals (Micro-credential) (5023)	Increase

This section identifies new qualifications and credentials standard setters have developed to meet industry needs. We want providers to consider reprioritising to deliver this provision.

Category	Qualification or credential	Type of change
Museum	New Zealand Certificate in Museum Practice (Level 4) (2419)	Increase – work-based
Screen	New Zealand Certificate in Screen Industry Skills (Level 3) (5064)	Increase – work-based
	New Zealand Certificate in Screen Industry Skills (Level 4) (5065)	New delivery sought
	New Zealand Screen Industry Skills (10 Micro-credentials) (Levels 5 and 6) (5328–5338)	New delivery sought
Sport and Recreation	Education Outside the Classroom (EOTC) – Person in Charge (Micro-credential) (5412)	New delivery sought
	Education Outside the Classroom (EOTC) Coordinator (Micro-credential) (Level 7) (5415)	New delivery sought
Conservation	Introduction to Conservation (Micro-credential) (Level 3) (5307)	New delivery sought
	Manage Self in Conservation Activity as Part of a Team (Micro-credential) (5384)	New delivery sought
	Carry Out a Conservation Activity (Micro-credential) (5385)	New delivery sought
Music	NZ Certificate in Piano Tuning Technician (Level 4) (4828)	New delivery sought – work-based or provider-based only (not extramural)
Performing Arts	New Zealand Certificate in Entertainment and Event Technology (Level 4) (5367)	New delivery sought – work-based or provider-based only (not extramural)
	New Zealand Diploma in Performing Arts Technical Production (Level 5) (5370)	New delivery sought – work-based or provider-based only (not extramural)
	New Zealand Diploma in Performing Arts Technical Production (Level 6) (5371)	New delivery sought – work-based or provider-based only (not extramural)

Performing Arts Emerging Tutor (Micro-credential) (Level 2) (5121)	New delivery sought – work-based or provider-based only (not extramural)
New Zealand Certificate in Creative Promotion (Level 4) (5492)	New delivery sought – provider-based
New Zealand Diploma in Creative Production (Level 5) (5493)	New delivery sought – provider-based

Construction and Infrastructure: including Construction, Concrete, Plumbing, Infrastructure, Water, Gas, Electricity, Telecommunication, and Roothing

This section identifies provision that the industry has indicated would benefit from a change in delivery. This may be an increase in completions, a decrease in enrolments or a change (eg, the mode).

Category	Qualification or credential	Type of change
Access Trades	New Zealand Certificate in Industrial Rope Access (Level 5) (2360)	Increase – preference for work-based
	New Zealand Certificate in Rigging (Level 4) with optional strands in Construction Rigging, and Telecommunications Rigging (2356)	Increase – preference for work-based
	New Zealand Certificate in Rigging (Level 5) (2357)	Increase – preference for work-based
	New Zealand Certificate in Scaffolding (Trade) (Level 4) (3710)	Increase – preference for work-based
Civil Infrastructure	New Zealand Certificate in Infrastructure Works (Level 2) (2522)	Increase – preference for work-based
Construction and infrastructure	New Zealand Diploma in Architectural Technology (Level 6) (2416)	Increase
	New Zealand Diploma in Construction (Level 6) with strands in Construction Management, and Quantity Surveying (2420)	Increase
	New Zealand Diploma in Engineering (Level 6) with strands in Civil Engineering, Electrical Engineering, Electronics Engineering, Mechanical Engineering, and Fire Engineering (2612)	Increase
	New Zealand Diploma in Detailing (Structural) (Level 5) with strands in Light Steel Frame, Steel Reinforcing, Structural Steel, and Precast Concrete (4515)	Increase
	New Zealand Certificate in Trowel Trades (Level 4) with strands in Floor and Wall Tiling, Proprietary Plaster Cladding Systems, Ferro-cement Tank Manufacture, Refractory Installation, and Solid Plastering (with optional strands in Fixing Cavities and Substrates, and Decorative Mouldings) (3137)	Increase
	New Zealand Certificate in Painting and Decorating (Level 4) with strands in Specialised Spraying, Wallcoverings, and Specialised Coatings (3568)	Increase
	New Zealand Certificate in Interior Linings Installation (Level 4) with strands in Fixing, and Finishing (with optional strand in Fibrous Plaster Installation) (3061)	Increase
	New Zealand Diploma in Surveying (Level 6) (2959)	Increase
	New Zealand Certificate in Building Regulatory Environment (Level 4) (3029)	Increase
	New Zealand Certificate in Construction Related Trades (Main Contract Supervision) (Level 5) (4237) – replacing 2382	Replace
Complex Apprenticeships: New Zealand Certificate in Glazing (Level 4) with strands in Residential Glazing, Commercial Glazing, and Frameless Glazing (5347) – replacing 2945	Replace	
Electrical Supply	New Zealand Certificate in Electricity Supply (Line Mechanic Distribution) (Level 4) with optional strand in Live Low Voltage Lines (2197)	Increase
	New Zealand Certificate in Wind Farm Maintenance (Level 3) (4261)	Increase
	New Zealand Certificate in Electricity Supply (Distribution Live Line Stick) (Level 4) (4281)	Increase
Electrotechnology	New Zealand Certificate in Data Cabling (Level 3) (5057)	Increase
	New Zealand Certificate in Electrotechnology (Level 3) with strands in Installation, and Service (2767)	Increase

	New Zealand Certificate in Customer Premises Systems (Level 4) with strands in Structured Cabling, Control and Automation, Signal Reception and Distribution, and Wireless Systems (2769)	Increase
	New Zealand Certificate in Telecommunications (Level 3) with strands in Copper Network Maintenance, Optical Fibre Network, and Transmission (3767)	Increase
Plumbing, Gasfitting and Drainlaying (PGD)	New Zealand Certificate in Plumbing, Gasfitting and Drainlaying (Level 3) (2660)	Decrease new enrolments
	New Zealand Certificate in Plumbing (Level 5) (3838)	Increase
	New Zealand Certificate in Drainlaying (Level 5) (3839)	Increase
	New Zealand Certificate in Gasfitting (Level 5) (3840)	Increase
Design	New Zealand Diploma in Design (Level 5) with strands in Kitchen Design, and Bathroom Design (with optional strand in Light Commercial Design) (3221)	Decrease new enrolments
Infrastructure	New Zealand Certificate in Infrastructure Works (Civil) (Level 4) with strands in Earthworks, Road Construction, and Road Maintenance (2725)	Increase
	Temporary Traffic Management Design (Micro-credential) (4922)	Increase
	Underground Utility Location (Micro-credential) (4924)	Increase
	New Zealand Certificate in Infrastructure Works (Single Site Supervision) (Level 4) (5248) – replacing 2617	Replace
	New Zealand Certificate in Roadmarking (Level 3) (3235)	Increase
Cranes	New Zealand Certificate in Cranes (Level 4) with strands in Advanced Dogman, Crawler Crane, Mini Crane, Mobile Crane, Non-Slewing Articulated Crane, and Tower Crane (3731)	Increase
	New Zealand Certificate in Cranes (Advanced Crane Operation) (Level 5) (3732)	Increase
Water Services	New Zealand Certificate in Drinking-water Treatment (Level 4) with optional strand in Multistage Processes (4138)	Increase
	New Zealand Certificate in Infrastructure Works (Pipeline Construction and Maintenance) (Level 4) with strands in Drinking-Water, Stormwater and Wastewater, and Trenchless Technologies (3858)	Increase
	New Zealand Certificate in Wastewater Treatment (Level 4) with optional strand in Multistage Processes (4142)	Increase
Onsite Construction	New Zealand Certificate in Demolition (Level 3) (5058)	Increase
	New Zealand Diploma in Joinery Detailing (Level 5) (5133)	Maintain
	Steel Fixing/Reinforcement Installation for Construction and Infrastructure (Entry-Level) (Micro-credential) (4842)	Increase
Gas Infrastructure	Gas CoC Protocol: Excavation for Work on Gas Infrastructure (Micro-credential) (5134)	Increase
	Gas CoC Protocol: Foundation Skills for Working on Gas Infrastructure (Micro-Credential) (5063)	Increase
	Gas CoC Protocol: Low-capacity Gas Measurement Systems for Gas Infrastructure (Micro-credential) (5135)	Increase
Water	New Zealand Diploma in Wastewater Treatment (Level 5) (4143) – replacing 3856	Increase

This section identifies new qualifications and credentials standard setters have developed to meet industry needs. We want providers to consider reprioritising to deliver this provision.

Category	Qualification or credential	Type of change
Construction	Contribute to Sustainable Practices in a Construction Environment (Micro-credential) (5387)	New delivery sought
	Reduce Material Waste in a Construction Environment (Micro-credential) (5388)	New delivery sought
	New Zealand Certificate in Complex Glazing (Level 5) (5453)	New delivery sought
	New Zealand Certificate in Swimming Pool Building (Level 4) (5457)	New delivery sought
	Foundation Mathematics for Engineering (Micro-credential) (5326)	New delivery sought

	Introductory Mathematics for Engineering (Micro-credential) (5327)	New delivery sought
	Introduction to Detailing Micro-credential (5105)	New delivery sought
	Trades Essentials (Micro-credential) (Level 2) (4971)	New delivery sought – work-based or provider-based (not extramural)
Access Trades	Temporary Edge Protection (Micro-credential) (5310)	New delivery sought
Gas Infrastructure	New Zealand Certificate in Reticulated Gas Pipelines (Level 4) with strands in Metering and Pressure Control, and Polyethylene Pipeline Construction (3593)	New delivery sought
Traffic Management	Temporary Traffic Management (TTM): Monitoring TTM controls (Micro-credential) (5286)	New delivery sought
	Temporary Traffic Management (TTM): Mobile Supervision (Micro-credential) (5287)	New delivery sought
Infrastructure	New Zealand Certificate in Streetscape Paving (Level 4) (5456)	New delivery sought
Electrical	Supervision of Prescribed Electrical Work (Micro-credential) (5459)	New delivery sought
On-site Construction	Installing Carpet Tile Flooring Systems (Micro-credential) (5361)	New delivery sought
	Installing Floating Floor Systems (Micro-credential) (5362)	New delivery sought

Appendix D: Glossary

Course completion rate	The proportion of successful course completions each year, relative to total course enrolments.
Credit achievement rate	The credits achieved by learners at a tertiary education organisation (TEO) as a proportion of the total number of credits learners are expected to achieve in a given period at each TEO.
DAP	Disability Action Plan.
DXP Ngā Kete	A secure web portal or “doorway” into our information. It gives providers quick access to information from multiple sources through search and browse functionality.
EER	External Evaluation and Review. The periodic review of TEOs conducted by the New Zealand Qualifications Authority (NZQA) as part of NZQA’s evaluative Quality Assurance Framework.
EPIC	Educational Performance Indicator Commitment.
First-year retention rate	The proportion of learners that enrol in their second year of study for their intended qualification after their first year of study, relative to the rest of their cohort.
Foundation education	Programmes at Levels 1 and 2 on the New Zealand Qualifications and Credentials Framework (NZQCF), and Level 3 when delivered through the Youth Guarantee Fund. Foundation education also includes learning below Level 1.
Higher education	Programmes at Levels 7 (degree) to 10 on the NZQCF.
ISB	Industry Skills Board (ISB) . There are eight ISBs.
iQAF	NZQA’s integrated Quality Assurance Framework. iQAF replaces their evaluative Quality Assurance Framework, which used EER.
Ka Hikitia	The Māori Education Strategy: Ka Hikitia
Kia Ōrite Toolkit	A toolkit that provides current, New Zealand-specific guidance to help tertiary education organisations better support disabled learners: Kia Ōrite Toolkit
Learner Success Framework	A framework that providers can use to address inequities in the tertiary education system: Learner Success Framework
LSP	Learner Success Plan.
Mātauranga Māori	Māori knowledge in its widest and broadest forms, including all aspects of Māori culture.

Micro-credential	Study or training that leads to an award on the NZQCF but does not, in and of itself, lead to an award of a qualification: Micro-credentials – New Zealand Qualifications Authority
MoP	Mix of Provision.
New provider	A provider that has not received Tertiary Education Commission (TEC) on-Plan funding in the last 12 months.
Off-Plan funding	Funding assessed and allocated through a contract management approach (under section 428 of the Education and Training Act).
On-Plan funding	Funding assessed and allocated through submitting an Investment Plan (under section 425 of the Education and Training Act).
Plan Guidance	Guidance we publish on the content and criteria used to assess proposed Investment Plans (this document).
Programme completion rate	The proportion of learners in a starting cohort that go on to complete a programme at the same NZQCF level at the same provider. The period for measuring programme completion is three years for work-based learning at NZQCF Levels 1 to 3; four years for work-based learning at NZQCF Level 4 and above; and six years for apprenticeship programmes.
PTE	Private training establishment.
Qualification completion rate	The proportion of learners in a starting cohort that go on to complete a qualification at the same level at the same TEO. The period for measuring qualification completion is two years at Levels 1–3, four years for qualifications at Levels 4–7 (non-degree), and six years for qualifications at Level 7 (degree) to 10.
SSP	Statement of Service Performance. Reports that provide primarily non-financial information recording performance against specified objectives.
Supplementary Plan Guidance (SPG)	A document that supplements the information contained in Plan Guidance. It provides any updates and is usually released in June.
Tau Mai Te Reo	The Māori Language in Education Strategy: Tau Mai Te Reo
TEI	Tertiary education institution. TEIs include universities, polytechnics and wānanga.
TEO	Tertiary education organisation.
TES	Tertiary Education Strategy. Sets out the Government's long-term strategic direction for tertiary education: Tertiary Education Strategy 2025–2030 (PDF 1.3 MB)
Vocational education	Programmes at Levels 3–7 (non-degree) on the NZQCF and all industry training.