

# GLOBAL IMPACT VISA EVALUATION: INTEGRATION AND EARLY OUTCOMES

## Year 2 Report

(Updated report, original report  
date: December 2019)

May 2020





# MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT

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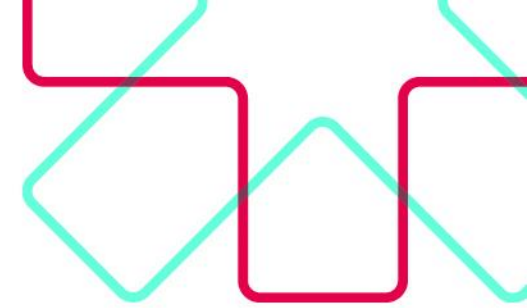
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# PREFACE

This report has been prepared for the Ministry of Business, Innovation and Employment by Penny Fitzpatrick, Donella Bellett and Olga Batura from MartinJenkins (Martin, Jenkins & Associates Limited).

MartinJenkins advises clients in the public, private and not-for-profit sectors. Our work in the public sector spans a wide range of central and local government agencies. We provide advice and support to clients in the following areas:

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# EXECUTIVE SUMMARY

The Ministry of Business, Innovation and Employment (MBIE) have engaged MartinJenkins to evaluate the new Global Impact Visa (GIV).

The purpose of the evaluation is to assess the implementation, outputs and early outcomes of the GIV pilot. The objectives of the evaluation are to:

- understand the process in order to support ongoing implementation and continuous improvement
- identify and assess the value of emerging outcomes.

## Year 2 of the evaluation

The evaluation is being conducted over three years.

Year 2 focuses on *integration* of Fellows into New Zealand innovation systems and communities. The report also presents early feedback on *outcomes*, and makes comment on the direction of travel, to meet the high level of interest in pilot outcomes. The operation of the EHF and INZ *partnership* is being looked at in each year of the evaluation, as are *attraction and selection* processes. In year 2 we also look at the position of the pilot within the government's wider system for enabling innovation and the roles of other government agencies in supporting the pilot.

Caveats:

- While this report contains feedback on outcomes it is important to understand:
  - it is too early to provide an assessment of the quality of outcomes
  - this is an evaluation of the GIV/EHF pilot, not an evaluation of any individual Fellow or their venture

- it is also important to note that the total number of Fellows is small and that the data that informs this report is drawn from a small population.

Year 2 methodology:

- each year of the evaluation draws on mixed-methods and data sets
- key inputs to this year's report include surveys (of Fellows and the 'innovation ecosystem'), analysis of key administrative data, and qualitative interviews with the programme partners, selected Fellows and members of wider innovation ecosystems in New Zealand (including government and non-government)
- most data in this report was collected in mid-late 2019: the Fellow survey was conducted in August 2019; the Ecosystem survey was conducted in September/October 2019; Interviews were conducted in October 2019. INZ data was extracted to cover the pilot period up to 1 November 2019.

## High level overview of the Global Impact Visa

The GIV is a new immigration product designed to facilitate the attraction, selection and integration of high impact entrepreneurs, investors, change makers and start-up teams. The GIV is being piloted in partnership between Immigration New Zealand (INZ) and a private partner (the Edmund Hillary Fellowship [EHF]). The pilot began in mid-2017 and runs for four years. In that time up to 400 GIVs may be issued.



The three-year visa provides the opportunity to create, support, influence, connect and attract ventures, funding and models that result in positive global impact, from New Zealand. The GIV is also designed to produce positive benefits within New Zealand, through the creation or support of successful innovation-based enterprises locally. Our Year 1 evaluation report discussed the potential for wide ranging social and environmental benefits to also result from Fellows' ventures. At the end of the three-year visa, International Fellows can apply for Permanent Residency. To be eligible for Permanent Residence they need to maintain the support of EHF and be on track to create impact in New Zealand.

International Fellows are invited to join the Fellowship and to apply for a Global Impact Visa, if required – each Cohort of Fellows includes a smaller number of New Zealand Fellows, also selected for their innovation, entrepreneurial and/or investment focus. While it is hoped that International Fellows will eventually choose to settle in New Zealand, they are not required to live in New Zealand or spend a specified amount of time in New Zealand while holding a GIV.

At the end of 2019 there are 180 Fellows in five Cohorts – 129 International and 51 New Zealand Fellows (selection for a sixth Cohort is in progress).

- 115 GIV have been issued, of a potential 400:
  - 15 International Fellows have been selected that don't hold a GIV: 8 hold other visas and don't require a GIV,<sup>1</sup> 5 have yet to apply, and 2 had applied and are waiting for a decision.
  - 9 international applicants were selected by EHF but didn't join the Fellowship: 4 had their application for a GIV declined by INZ,<sup>2</sup> 3 withdrew from the process, and 2 did not activate their GIV within the prescribed timeframe.
- To date, International Fellows are more likely to be male than female; entrepreneur rather than investor; from North America; aged 30-39; working in a professional / scientific / technical industry or in financial services. This profile has not changed substantively since our Year 1 report.
- New Zealand Fellows are more likely to be female, slightly younger on average and working in a wider range of industries, also including education / training, and public administration.

<sup>1</sup> A GIV is not required for International Fellows who have the right to reside in New Zealand through their Australian citizenship, their partner or another visa category. Note that Permanent Residence holders are counted as New Zealand Fellows, not International Fellows.

<sup>2</sup> Information supplied by INZ on the four decline reasons: two 'failed instructions' – not supported by EHF', one 'failed instructions – no medical', one 'failed instructions'.



## Attraction and selection summary

The attraction and selection processes continue to be implemented well, by both EHF and INZ. The pilot is continuing to enable access for International Fellows, some of whom wouldn't otherwise come to New Zealand.

Processes are transparent and robust, and generally well regarded by selected Fellows.

- Number of International Fellows: EHF's focus continues to be on quality not quantity of Fellows.
  - With three cohorts remaining (out of eight), only 115 of the potential 400 GIV have been issued. This is lower than the number of International Fellows selected (129) because not all Fellows need a GIV to access New Zealand and some are yet to apply for or receive a GIV.
  - If Cohorts 6 through 8 select similar numbers of International Fellows to previous cohorts, and if similar numbers of International Fellows can access New Zealand through other classes of visa, around half of the maximum potential number of GIV that are available will remain unallocated (400 GIV are available through the pilot). This effectively doubles the 'per GIV' cost.<sup>3</sup>
  - According to EHF, high numbers of quality applications are being received but cohort sizes have to date been limited by the numbers able to be accommodated at Welcome Weeks. Rather than rejecting quality applicants when a Welcome Week would be oversubscribed, EHF are continuing to select quality applicants and asking them to defer to a future cohort (and therefore a future Welcome Week).
- This strategy may not be understood by ecosystem stakeholders, some of whom expressed concern that limits to cohort capacity may be resulting in New Zealand missing out on the chance to access quality International Fellows (and the benefits expected to flow from them). EHF plans to increase the number of Welcome Week events in 2020 to accommodate greater numbers of Fellows in each remaining cohort.
- Diversity of International Fellows:
  - EHF perceive rising numbers of quality applications; while the numbers of applications continue to be received at around the same rate for Cohorts 4 and 5 as we saw for Cohorts 1-3, EHF report that the quality is higher.
  - the demographic profile of **applicants** is largely the same as reported in Year 1 (most are entrepreneurs, a high proportion are male, and over a quarter are from North America).
- Quality of International Fellows: feedback from the ecosystem indicates that Fellows, especially International Fellows, are of high quality.

<sup>3</sup> Following patterns to date, we estimate that approximately 80 more International Fellows will be selected in Cohorts 6-8, and around 75 of these will require a GIV to join the Fellowship (ie those that don't have other classes of Visa / NZ citizenship / Permanent Residency).



- The prices Fellows pay to accept a place in the Fellowship have increased considerably in Year 2. These costs may be a barrier to attracting future high-quality applicants and may be limiting diversity of applicants (favouring those with significant resources to draw from). The EHF team identified that their rationale for increasing prices is to better financially sustain the programme and responds to the expectation from government for EHF to be more self-funding.





### Attraction: going well

Sufficient credible applications are received to support a robust selection process

- Numbers of compliant applications are relatively stable – numbers peaked for Cohort 3 and dropped again for Cohorts 4 and 5.
- EHF report that the *quality* of compliant applicants is higher.
- Compared to Fellows, applicants are more likely to be entrepreneurs, male, and older; they are also from a wider range of countries than selected Fellows.
- INZ and word of mouth continue to be the most important attraction methods.
- Some Fellows believe the application and joining costs are high, and that future applicants may be deterred by the increasing costs of the Fellowship.

**1491** compliant applications  
**547** credible applications to choose from (following initial review)



### Selection: on track

High quality Fellows (International and New Zealanders) are being selected, total numbers are low

The profile of International Fellows is unchanged from last year: most are entrepreneurs (84%), male (64%), from North America (58%), aged 30-39, and working in a *professional/scientific/technical* or *finance/insurance* industry.

- EHF report that 90% of International Fellows have experience in the tech sector, and/or as founders (61% tech sector experience, and 29% founder experience beyond tech start-ups).
- Primary citizenship – North American applicants are more likely to be selected (58% of International Fellows are from North America, but only 29% of applications come from this region).
- Gender – there are more male Fellows than female (60% and 39% respectively), but female applicants are more likely to be selected.
- NZ Fellows make up 28% of Fellows (the proportion peaked in Cohort 3).
  - As a group they are more likely to be female and they work in a wider range of industries than International Fellows.
- The focus continues to be on quality not quantity – with three cohorts remaining, 129 International Fellows have been selected and only 115 of the potential 400 GIV have been issued.
- The selection process is robust and rigorous. In total only four ‘selected’ Fellows have been turned down for a GIV by INZ (all for ‘failed instructions’ – see footnote above).

**180** Fellows

- **129** International Fellows
- **51** NZ Fellows



## Integration summary

Integration is a loosely defined concept, that is more 'process' than 'destination'. The model for supporting Fellow integration is both EHF-led and Fellow-led – leveraging the Fellowship and the connections that are expected to be built.

### Presence and intentions – mixed

The GIV does not require Fellows to be in New Zealand,<sup>4</sup> however there is an expectation that they will engage, and that some of this engagement involves being in the country. It is not known how much time in country is necessary to enable Fellow contribution, and how the frequency and amount of time differs for individuals.

The physical presence of International Fellows is lower than the previous year.

- Few International Fellows are currently here (13 out of 112 that were tracked in INZ data), and two-thirds have spent less than 10% of their time here since joining the Fellowship.<sup>5</sup>
- International Fellows from Cohort 2 continue to spend less time here than other cohorts (on average 10% of elapsed time) – Fellows from Cohort 1 are spending the most time here (on average 32% of elapsed time) followed by Fellows from Cohorts 3 and 4 (on average 18% and 17% respectively).
  - Following early observations of Cohort 2, EHF placed more focus on selecting those able to spend time in the country – current data for Cohorts 3 and 4 indicates that this was successful.

- A minority of Fellows have made their home here (17 survey respondents), nearly all intend to apply for Permanent Residency.
  - Looking ahead, most Fellows who are not living here intend to spend more time in the future, including another 22 who plan to apply for Permanent Residency. Fellows identified a number of barriers which may impact on these plans (changing personal circumstances, difficulty relocating business, need to maintain international networks).

### Connection and inclusion – good

Connection is a key enabler of integration.

- Fellows feel well connected to each other, particularly to their own cohort and those they are geographically close to.
- Fellows are building good professional connections – most commonly with investors and entrepreneurs, business and industry, and social enterprises. They are *less* likely to be connected to economic development agencies, central and local government, and academia; they also find these groups the most difficult to connect to.
- Social connection is a challenge for some Fellows and their families – housing, schooling, making friends, and spouses finding work all present challenges.

Fellows and the Fellowship are more visible in main centres and in some sectors. This is to be expected given the small team and limited resources of EHF, and the relatively small size of the Fellowship. Feedback from both

<sup>4</sup> EHF require Fellows to attend the Welcome Week for their Cohort.

<sup>5</sup> INZ data was extracted to cover the pilot period up to 1 November 2019, 'currently here' was as of 1 November 2019.





Fellows and the ecosystem indicates that the Fellows are starting to engage with some regions – settling, creating jobs and organisations, investing, and raising capital.

### **Understanding of the New Zealand context – growing**

International Fellows are broadening their understandings of Māoritanga and the unique context for innovation and entrepreneurship in New Zealand. However, they are also finding that it is taking time to understand and adapt to the New Zealand business context. The government’s wider agenda for innovation, and how the GIV fits with that agenda, is not well understood by a number of Fellows.

### **Support for integration – meets Fellows’ expectations**

Most Fellows feel well-supported to integrate, with support to learn about Māoritanga rated particularly highly.

Factors that **enable** Fellow integration include: the flexibility of the GIV, the support received through the Fellowship, and the induction and other support provided by EHF.

- EHF has limited resources and is generally perceived to be achieving a lot with those resources.
  - Most Fellows report EHF support meets or exceeds their expectations (ranging from 69%-93% across the supports explored in the evaluation), particularly for learning about Māoritanga (93% reported support in this area met or exceeded their expectations). However up to 29% of Fellows report the support is less than they expected in each domain.
  - Welcome Week and New Frontiers are particularly valued, as is the proactive and reactive support provided through practical advice for settling here and professional introductions.

Key suggestions for improving support for Fellows’ integration are:

- more structured matchmaking and introductions between Fellows
- more structured approach to introducing Fellows to the ecosystem – in addition to networking events
- additional support to understand the New Zealand context (business and understanding of Māori and iwi, noting that most say they are building a broad understanding of Māoritanga)
- access to additional funding sources.

In 2019, the EHF team’s focus was on financial resilience and ensuring the survival of the programme, following discussions with the government in February 2019. EHF report that they see potential to further activate Fellow contributions, both with more resources, and as they learn through experience more about what methods work best.





### Integration: doing OK

A small number of Fellows have settled, most are spending little time here  
Fellows feel connected and supported

- Two-thirds (67%) of International Fellows have spent **less than 10%** of their time here since joining the Fellowship.
- 15% of International Fellows have spent **more than 50%** of their time here since joining the Fellowship.
- Half of all Fellows report ‘high’ or ‘very high’ levels of connection with other Fellows.
- Fellows are *most likely* to be connected with investors and entrepreneurs, businesses and industry, and social enterprises – around half of all Fellows reported making 6+ new connections with these groups.
- Around a third have made *no new connections* with central government, local government, economic development agencies, and academia.
- Most Fellows report that the integration support they have received meets or exceeds their expectations.

**13** International Fellows are currently here (out of 112 Cohort 1-5 Fellows that could be tracked by INZ)

**17** International Fellows report they have settled here

**37** International Fellows report they plan to have a substantial presence here in future

## Public-private partnership summary

The relationship between the key parties in the public-private partnership has become more transactional and strained as the pilot has progressed.

Stakeholders from agencies across New Zealand’s innovation ecosystem (within and outside of government) express a lot of support for the pilot, but there are limited examples of that support being leveraged to access additional resources (in cash or in kind) to support the integration of Fellows into the New Zealand innovation ecosystem.

The concept of an ‘innovation system’ is that there are multiple actors that each play their own part. INZ delivers a very specific function in the innovation system (ie facilitating the bringing in of talent). Other functions fall to other agencies (eg facilitating access to capital, support for R&D etc). Stakeholders are commonly of the opinion that INZ was the natural home for the pilot initially, given the focus on attraction and innovation in visa processes. However, as the pilot progressed further into the integration phase, and in the context of the INZ shift in focus back to its core role as a regulator, other parts of government are better placed to broker the connections required to support the pilot going forward.

Some stakeholders believe that the pilot is under-resourced to deliver the supports Fellows need to integrate.

As the pilot moves further into the integration phase, it would be timely to revisit the potential and / or expected roles and contributions of relevant government agencies, and mechanisms for their engagement with the pilot. This is an exercise MBIE could lead, in collaboration with EHF and wider ecosystem stakeholders.

Greater clarity is also needed on how Fellows will be supported post-pilot, to integrate and to meet requirements for Permanent Residency – questions have been raised by Fellows, EHF and ecosystem stakeholders.



## Early outcomes summary

While it is still early days for exploring outcomes, Fellows continue to report positive progress. As with the previous year, most Fellows report a *high* or *very high* contribution to at least one outcome domain, a view shared by Ecosystem representatives. This is a good finding in the context of the expectations for the programme – that outcomes are expected to grow and develop over time.

Fellows are most positive about their progress in the **creation** of new jobs and businesses, followed by **support** provided for businesses, and **connections** being made. Fellows reported less progress being made in the **attraction** of new investment.

Most Fellows are making good progress on their ventures, though around a third are finding progress slow. Factors impacting progress include: lack of understanding of the New Zealand business culture, difficulty building trust when off-shore, and regulatory difficulties. Positive outcomes are attributed to the Fellowship, including quality of outcomes being higher, progress more sustainable, scale being bigger, and progress faster.

Looking to the future Fellows and the ecosystem are confident that Fellows' impact will increase over time – particularly for create, support, influence and connect. Fellows are least confident about their likely future impact in the attract domain.



**Outcomes:**  
on track

Fellows and the ecosystem report positive progress

Tangible outcomes mainly in main centres

### CREATE

- 114 jobs created across 9 regions (predominantly in Wellington and Auckland).
- 25 Fellows have created organisations across 16 regions (predominantly in Auckland, Canterbury and Wellington).

### SUPPORT

- Capital invested in organisations across 11 regions of the country (predominantly in Wellington and Auckland); most investments are in the ventures of other Fellows – for \$NZ50,000 or less.
- Governance roles are held by 21 Fellows, some hold multiple roles.

### ATTRACT

- Capital raised for organisations located in 16 regions of the country (predominantly in Auckland and Wellington); most raised capital has been for the ventures of other Fellows – amounts range from less than \$NZ10,000 to two in excess of \$NZ5,000,000.



# REPORT NOTES

## Language

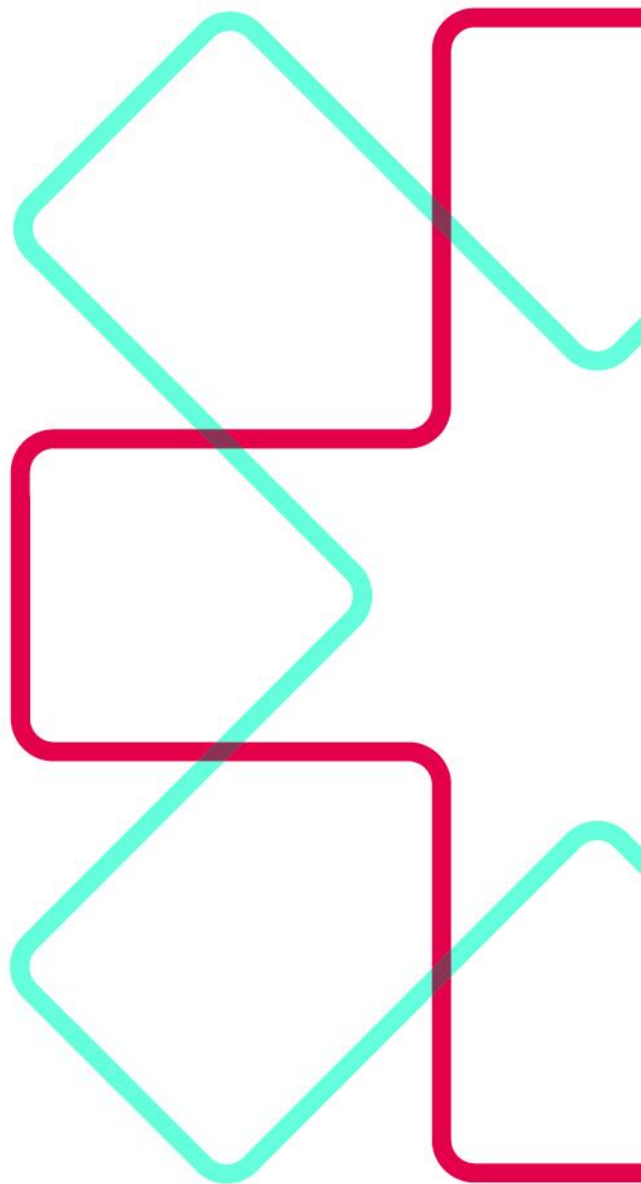
'International Fellows' refers to a broader group than just GIV holders. There are small number of International Fellows who have yet to obtain a GIV or who don't require one.

A GIV is not required for International Fellows who have the right to reside in New Zealand through their Australian citizenship, their partner or another visa category. Permanent Residence holders are counted as New Zealand Fellows, not International Fellows.

## Data Sets

The report draws on multiple data sets relating to Fellows. Every effort has been made to ensure the data is accurate and consistent but the total number of Fellows contained in each data set differs.

- Set 1: total number of Fellows (New Zealand and International, and number of GIV issued).
  - Constructed by MBIE from data supplied by EHF and INZ. This set gives the most accurate count of Fellows, it uses agreed rules to categorise Fellows and assign them to cohorts.
- Set 2: EHF operational data – applicant and Fellow demographics drawn from application forms.
  - Number of Fellows in this set is **slightly higher** than in set 1, and cohort sizes vary slightly.
  - Appendix 2 uses the same data set (but 'uncleaned') – it contains more Fellows (due to inconsistent counting of teams v individuals, and inclusion of deferrals).
- Set 3: INZ operational data on International Fellows – issuing of visas and time spent in New Zealand.
  - Data covers the pilot period up to 1 November 2019. Number of International Fellows in this set is **slightly lower** than in set 1 as not all International Fellows received their GIV by 1 November 2019.
- Set 4: MartinJenkins 2019 survey data.
  - Number of Fellows in the set is **lower** than in set 1 – 68% of International Fellows responded to the 2019 survey and 57% of New Zealand Fellows responded.



# INTRODUCTION

## Overview of the evaluation

The Ministry of Business, Innovation and Employment (MBIE) have engaged MartinJenkins to evaluate the new Global Impact Visa (GIV).

The purpose of the evaluation is to assess the implementation, outputs and early outcomes of the GIV pilot. Quality feedback is needed to inform reports to Ministers, make policy decisions and to support any future budget bids should the programme be continued. The evaluation runs over a three-year period – this is the Year Two report.

The evaluation objectives and questions are designed to test the Intervention Logic,<sup>6</sup> to see whether implementation is as expected and what outcomes are achieved. The objectives of the evaluation are to:

- understand the process in order to support ongoing implementation and continuous improvement
- identify and assess the value of emerging outcomes.

## Audience

The primary audience for the evaluation is MBIE and its Ministers, to inform their ongoing policy development and implementation of immigration policies. EHF also have a high level of interest in the evaluation findings and will use the findings to inform their ongoing implementation and continuous improvement.

<sup>6</sup> The Intervention Logic was developed as part of the evaluation design, see Appendix 1.

## Year 2 evaluation focus

Year 2 focuses on the *integration* of Fellows. The report also comments on *attraction* and *selection*, and updates early feedback on *outcomes*, to meet the high level of interest in pilot outcomes. The operation of the EHF and INZ partnership will be looked at in each year of the evaluation.

## Caveats

While this report contains feedback on outcomes it is important to understand:

- it is too early to provide an assessment of the quality of outcomes
  - GIV Fellows have been in the Fellowship for only a short time, from a maximum of approximately twenty-four months (Cohort 1), to having only just received their GIV (Cohort 5)<sup>7</sup>
- this is an evaluation of the GIV/EHF pilot, not an evaluation of any individual Fellow or their venture
  - the programme design expects that some Fellows will experience ‘failures’ and that visible, tangible outcomes will take time to emerge
  - rather than assess the value of outcomes achieved to date this report provides Fellows’ feedback on progress to date and presents examples of the achievements they have reported.

It is also important to note that the total number of Fellows is small and that the data that informs this report is drawn from a small population.

<sup>7</sup> These time frames are estimated based on the timing of the evaluation surveys and interviews.



## Year 2 methodology

Each year of the evaluation draws on mixed-methods and data sets. Key inputs to this year's report are outlined in Table 1.

**Table 1: Key inputs to Year 2 of the evaluation**

Input / data	Description
Administrative data analysis (Data sets 1, 2 and 3)	<ul style="list-style-type: none"> <li>• EHF data supplied on Applications and Fellows.</li> <li>• INZ data on GIV declines, number of days International Fellows are spending in country, EHF funding.</li> <li>• Other data and information on funding, events and other programme details.</li> </ul>
MartinJenkins survey: Fellows (Data set 4)	<ul style="list-style-type: none"> <li>• International Fellows 68% response rate, 88 responses               <ul style="list-style-type: none"> <li>– Cohort 1 = 17, Cohort 2 = 11, Cohort 3 = 15, Cohort 4 = 14, Cohort 5 = 24, Cohort 6 = 7.</li> </ul> </li> <li>• New Zealand Fellows 57% response rate, 29 responses               <ul style="list-style-type: none"> <li>– Cohort 1 = 3, Cohort 2 = 3, Cohort 3 = 5, Cohort 4 = 7, Cohort 5 = 10, Cohort 6 = 1.</li> </ul> </li> </ul>
MartinJenkins survey: Ecosystem	<ul style="list-style-type: none"> <li>• 92 responses               <ul style="list-style-type: none"> <li>– This survey was sent to contacts supplied by EHF; some Fellows also provided contacts.</li> </ul> </li> </ul>
Qualitative interviews	<ul style="list-style-type: none"> <li>• EHF: 1 team interview and 1 individual interview.</li> <li>• MBIE and INZ: 4 individual interviews.</li> <li>• Fellows:               <ul style="list-style-type: none"> <li>– International Fellows: 7 interviews, of which 4 fully moved to NZ and 3 are creating value for NZ from else where</li> <li>– NZ Fellows: 1 interview.</li> </ul> </li> <li>• Ecosystem: 10 interviews – selected to focus on stakeholders with a sector-wide view (eg, membership bodies), mix of regions, mix of central government, local government and non-government agencies, interest in policy and delivery enablers for innovation.</li> </ul>

## What is the GIV?

The Global Impact Visa (GIV) is a new immigration product designed to facilitate the attraction, selection and integration of high impact entrepreneurs, investors, change makers and start-up teams. The GIV is being piloted in partnership between Immigration New Zealand (INZ) and a private partner (the Edmund Hillary Fellowship [EHF]). The pilot began in mid-2017 and runs for four years. In that time up to 400 GIVs may be issued.

The three-year visa provides the opportunity to create, support, influence, connect and attract ventures, funding and models that result in positive global impact, from New Zealand. The GIV is also designed to produce positive benefits within New Zealand, through the creation or support of successful innovation-based enterprises locally. Our Year 1 evaluation report discussed the potential for wide ranging social and environmental benefits to also result from Fellows' ventures. At the end of the three-year visa, GIV holders can apply for Permanent Residency. To be eligible for Permanent Residence they need to maintain the support of EHF and be on track to create impact in New Zealand.

International Fellows are invited to join the Fellowship – each Cohort of Fellows also includes a smaller number of New Zealand Fellows, also selected for their innovation, entrepreneurial and/or investment focus. While it is hoped that International Fellows will eventually choose to settle in New Zealand, they are not required to live in New Zealand or spend a specified amount of time while holding a GIV.





**Table 2: Core components of the GIV policy design<sup>8</sup>**

What	Why	How – expected outcomes
Private-Public Partnership	<p>EHF bring a valuable skill set: they have the skills and experience to identify promising entrepreneurs and investors, and to support them</p> <p>INZ are responsible for managing risk and ensuring regulations are complied with</p> <p>EHF are able to operate more flexibly and innovatively than a government department</p> <p>EHF can attract new funding streams from outside of government</p>	<p>EHF and INZ will share responsibility for positive outcomes</p> <p>EHF’s flexibility and innovation will ensure a continuous focus on programme innovation and improvement</p> <p>Costs of the pilot will be shared between the public and private sector</p>
Strong focus on attraction, rigorous selection process	<p>NZ’s profile as an innovation hub needs to be raised</p> <p>Selected migrants need to be credible and have real potential</p> <p>Risk needs to be managed and immigration regulations complied with</p>	<p>Up to 400 talented migrants will be given the opportunity to come to NZ, bringing the potential to produce positive outcomes</p> <p>Migrants will bring ideas, global connections, skills, experience and investment that wouldn’t otherwise come to NZ</p>

What	Why	How – expected outcomes
<p>Visa that is complementary to existing visas: flexibility to come and go, pathway to residency, lower capital threshold than Investor and Entrepreneur visas</p>	<p>NZ wants to attract a different type of entrepreneurs and investors who otherwise would not or could not have come to New Zealand</p>	<p>More diverse migrants will come to NZ:</p> <ul style="list-style-type: none"> <li>• early-stage entrepreneurs and investors</li> <li>• entrepreneurs and investors who wouldn’t have otherwise qualified for a visa</li> </ul>
<p>Transparency around who receives a GIV</p>	<p>NZ’s innovation ecosystem needs to know who the GIV migrants are, and what they offer, in order to engage with them</p>	<p>EHF publish stories and information about GIV migrants to build and maintain a positive narrative about immigration</p> <p>Easily accessible information about GIV migrants will facilitate engagement between Fellows and regions, businesses, NGOs, and government (central and local)</p> <p>Visibility of who holds a GIV will raise the profile of the Fellowship with the public, and improve accountability</p>

<sup>8</sup> This table is reproduced from the Year 1 report. The policy assumed that GIV migrants and International Fellows would be one and the same. In practice, not all International Fellows require a GIV, and some are yet to apply for theirs.



What	Why	How – expected outcomes
Fellowship, Cohorts	<p>Cohort members will support and interact with each other (with support from EHF)</p> <p>Cohort members will network with their peers to attract an even wider group of applicants</p> <p>A Fellowship will be more visible than individual GIV holders</p> <p>Kiwi Fellows will support global migrants to integrate, and will benefit from connections to the global migrants</p>	<p>Fellows (migrants and Kiwis) will be supported to meet and grow their potential, and to maximise opportunities</p> <p>Fellows (migrants and Kiwis) will connect with innovation ecosystems in NZ and globally</p>

- **‘support’**: International Fellows will work with existing and emerging businesses based in New Zealand that employ and are owned by New Zealanders, especially innovative businesses
- **‘influence’**: International Fellows will influence the wider environment and innovation ecosystem, leading to spill-overs and contributing to a cultural shift in how business operates
- **‘connect’**: International Fellows will strengthen connections between New Zealand and entrepreneurs, investors, and businesses in other countries
- **‘attract’**: International Fellows will attract local and international investment.

Over the long-term, Fellows (International and New Zealand) are expected to produce positive economic impacts, as well as positive social and environmental impacts.

## What is the GIV seeking to achieve?

### Anticipated outcomes

The Intervention Logic for the evaluation shows the expected outputs and outcomes. International Fellows are expected to create positive impact in New Zealand and globally through developing ideas, leveraging global connections, and bringing skills, experience and investment to New Zealand.

Failures of individual ideas and ventures are to be expected, so that lessons can be learnt and ideas improved. Over time, and across all Cohorts, tangible examples of success will begin to emerge – they will be of high quality but not necessarily big in number. It is likely that a small proportion of the group will produce the majority of stand-out ‘successes’ or benefits.

Outcomes are expected across five inter-connected domains:

- **‘create’**: International Fellows will create impact through new, innovative and unique New Zealand based start-up **ventures** that employ New Zealanders

## Delivery of the pilot to date

This section provides context for the rest of the report by briefly outlining numbers and activities associated with implementation to date.

At the end of 2019 there are 180 Fellows in five Cohorts – 129 International and 51 New Zealand Fellows

Five cohorts have been chosen – two more cohorts since the Year 1 report. A sixth cohort is being selected as this report is written, with some Fellows already selected. Table 3 contains numbers for the first five cohorts, plus early/incomplete numbers for the upcoming sixth cohort. Note that Cohort 5 has only just been welcomed, so much of the feedback in the report relates to the first four cohorts only.



**Table 3: Attraction, selection, application and integration – key numbers**

Process	Key numbers	Insights
Attraction	New EOIs (total): 4182 (includes some for Cohort 6) Compliant applications: 1491 <ul style="list-style-type: none"> <li>• Cohort 1: 311</li> <li>• Cohort 2: 172</li> <li>• Cohort 3: 415</li> <li>• Cohort 4: 251</li> <li>• Cohort 5: 342</li> </ul>	Large number of EOIs received Good pool of compliant applications received

Process	Key numbers	Insights
Selection	180 Fellows selected = 129 International Fellows + 51 NZ Fellows <ul style="list-style-type: none"> <li>• Cohort 1: 27 Fellows                             <ul style="list-style-type: none"> <li>– 21 International Fellows + 6 NZ Fellows</li> </ul> </li> <li>• Cohort 2: 34 Fellows                             <ul style="list-style-type: none"> <li>– 25 International Fellows + 9 NZ Fellows</li> </ul> </li> <li>• Cohort 3: 41 Fellows                             <ul style="list-style-type: none"> <li>– 28 International Fellows<sup>9</sup> + 13 NZ Fellows</li> </ul> </li> <li>• Cohort 4: 31 Fellows                             <ul style="list-style-type: none"> <li>– 21 International Fellows<sup>10</sup> + 10 NZ Fellows</li> </ul> </li> <li>• Cohort 5: 47 Fellows                             <ul style="list-style-type: none"> <li>– 34 International Fellows<sup>11</sup> + 13 NZ Fellows</li> </ul> </li> </ul> Cohort 6 is being selected, to date there are 22: <ul style="list-style-type: none"> <li>• 19 International Fellows + 3 NZ Fellows</li> </ul>	Proportion of compliant applications selected and joining the Fellowship: <sup>12</sup> <ul style="list-style-type: none"> <li>• Cohort 1: 9%</li> <li>• Cohort 2: 17%</li> <li>• Cohort 3: 10%</li> <li>• Cohort 4: 12%</li> <li>• Cohort 5: 14%</li> </ul>

<sup>9</sup> This includes 5 Fellows who do not hold a GIV (all hold other visas)

<sup>10</sup> This includes 2 Fellows who do not hold a GIV (1 holds another visa, 1 has not applied).

<sup>11</sup> This includes 7 Fellows who do not hold a GIV (2 hold older visas, 3 have not applied, 2 have applied and are awaiting a decision).

<sup>12</sup> Note that the number selected and *invited* to join may be different to the numbers actually joining each Cohort. This is because not all of those selected go on to join the Fellowship, and/or some wait to join a subsequent Cohort.



Process	Key numbers	Insights
	NZ Fellows make up 28% of all Fellows in Cohorts 1 to 5 (51 out of 180)	Proportion of NZ Fellows grew, peaking in Cohort 3 and decreasing since <ul style="list-style-type: none"> <li>• 22% of Cohort 1 – 6/27</li> <li>• 26% of Cohort 2 – 9/34</li> <li>• 32% of Cohort 3 – 13/41</li> <li>• 32% of Cohort 4 – 10/31</li> <li>• 28% of Cohort 5 – 13/47</li> </ul>
Application to INZ for GIV	Four GIV applications declined by INZ all for 'failed instructions' – 1 no further information provided, 2 not supported by EHF, 1 no medical A fifth application was also initially declined but then approved after reapplication	

Process	Key numbers	Insights
Integration	<p>Formal activities:</p> <ul style="list-style-type: none"> <li>• Welcome Week for each Cohort, beginning October 2017</li> <li>• New Frontiers – three days event for Fellows to introduce themselves to the ecosystem, share visions and connect with leaders</li> <li>• City business orientation days</li> <li>• EHF's online community portal which allows Fellows to collaborate, eg sharing asks and offers, working on joint projects or working groups</li> <li>• Fellows Hui to bring Fellows from different cohorts to connect together</li> </ul> <p>Informal activities:</p> <ul style="list-style-type: none"> <li>• Online groups established to enable ongoing connection between Fellows (cohort groups and all Fellows group)</li> <li>• Fellow meet-ups – self-organised by Fellows</li> </ul>	<p>Both Welcome Weeks and New Frontiers are run by EHF</p> <ul style="list-style-type: none"> <li>• New Frontiers One, October 2017: 173 participants</li> <li>• New Frontiers Two, March 2018: 334 participants</li> <li>• New Frontiers Three, November 2018: 363 participants</li> <li>• New Frontiers Four, March 2019: 502 participants</li> <li>• City orientation event hosted by Christchurch City Council, attended by 32 Fellows</li> <li>• City orientation event hosted by Wellington Regional Economic Development Agency and councillors, attended by 10 Fellows</li> <li>• City orientation event hosted by Queenstown Lakes District Council, attended by 20 Fellows</li> <li>• City orientation event hosted by Dunedin City Council, attended by 10 Fellows</li> </ul>

Source: Data sets 1 and 2, EHF supplied data



## Funding used to date

The pilot is funded by a mix of government funding and revenue accessed by EHF from other sources.

A total of \$4m of government funding was made available to support the pilot. Table 4 shows that while there are still three cohorts to be selected and welcomed (out of the eight planned cohorts), almost all of the government funding has been drawn down (only \$200,000 remains).

**Table 4: Government funding - spend to date**

Year	INZ funding provided (\$NZ)	Total remaining (\$NZ)
Nov 2016 – Mar 2017	\$800,000	\$3,200,000
Apr 2017 – Mar 2018	\$1,300,000	\$1,900,000
Apr 2018 – Mar 2019	\$1,300,000	\$600,000
Apr 2019 – end Nov 2019	\$400,000	\$200,000

Source: EHF supplied data

Across all years of the pilot, government funding makes up 62% of total EHF revenue (down from 71% in our last report). Table 5 shows:

- a big decrease in reliance on government funding over time – dropping from 76% in Year 2, to 55% in Year 3, and 32% in Year 4 (note that the figures for Year 4 are only for a partial year)
- existing income streams are growing in importance over time
  - income from New Frontiers tickets and Catalysts both grew significantly in Year 3 (from 1-3% up to 10%)
- significant new income streams are being generated
  - a new Acceptance Fee has been introduced, providing significant additional income from Year 3, rising again in Year 4
  - Grants and Donations, and Gifts in Trust in Years 3 and 4 further change the profile of funding sources in those two years.

Accessing funding from other sources is in line with the programme intent – that EHF’s delivery of the EHF Fellowship become self-sustaining over time. Future evaluations will continue to report INZ-funding draw down and other revenue streams.



**Table 5: EHF revenue streams from project inception to November 2019**

	Year 1 Apr 2016 – Mar 2017	Year 2 Apr 2017 – Mar 2018	Year 3 Apr 2018 – Mar 2019	Year 4 (Partial year) Apr 2019 – Oct 2019	TOTAL
NZ and International Fellow Application Fees	38,113 (4% of Year 1)	388,537 (23% of Year 2)	480,150 (20% of Year 3)	309,226 (25% of Year 4)	1,216,026 (20%)
NZ and International Fellow Acceptance Fees	N/A	N/A	97,206 (4% of Year 3)	231,932 (19% of Year 4)	329,138 (5%)
Government Funding	800,000 (92% of Year 1)	1,300,000 (76% of Year 2)	1,300,000 (55% of Year 3)	400,000 (32% of Year 4)	3,800,000 (62% of total)
Interest Income	123 (0% of Year 1)	229 (0% of Year 2)	224 (0% of Year 3)		576 (0% of total)
New Frontiers Ticket Revenue	22,857 (3% of Year 1)	10,786 (1% of Year 2)	235,168 (10% of Year 3)	N/A	268,811 (4% of total)
New Frontiers Catalyst Income	7,500 (1% of Year 1)	15,000 (1% of Year 2)	230,000 (10% of Year 3)	145,000 (12% of Year 4)	397,500 (6% of total)
Grants and Donations (including Gifts in Trust)			17,606 (1% of Year 3)	129,312 (11% of Year 4)	146,918 (2% of total)
<b>Total Income</b>	868,593	1,714,552	2,360,359	1,215,530	6,158,969 (100% of total)

Source: EHF supplied data

Note: Year 1 incorporates some of the costs for Cohort 1; Year 2 incorporates the remaining costs for Cohort 1 and Cohort 2; Year 3 incorporates costs for Cohort 3 and Cohort 4; Year 4 incorporates costs for Cohort 5 and partial costs for Cohort 6 (processes are still underway).





# IMPLEMENTATION: ATTRACTION AND SELECTION

This section provides a concise update on attraction and selection, the topic was fully explored in last year's report.

The pilot depends on EHF attracting and selecting sufficient numbers of high-quality individuals, to New Zealand and to the Fellowship. In this section we provide a brief update on the number, diversity and quality of applicants and selected Fellows. We also discuss Fellows' overall satisfaction with the application and selection process run by EHF (for the Fellowship) and INZ (for the GIV).

Feedback on attraction and selection has been drawn from:

- EHF and INZ data
- survey responses from all Fellows
- respondents to the Ecosystem survey
- interviews with Fellows and representatives of the Ecosystem.



## Numbers, diversity and quality of Fellows

### EHF continues to select Fellows for quality rather than quantity

Table 6 shows the number of International Fellows and New Zealand Fellows that have been selected and joined the Fellowship to date.

The number of International Fellows selected for each cohort has been the product of the size and quality of the pool, and of the number of Fellows that EHF can accommodate at the Welcome Week induction. In Year 1, we found that EHF was selecting for quality rather than quantity of Fellows (for both International and New Zealand Fellows). It appears that this focus continues in Year 2.

Table 7 shows that EHF continue to receive a large volume of compliant applications. As with last year, a significant proportion of applications are being removed from the pool after the first gate, yet a good pool of credible applicants remains (on average 37% of applications make it through the first gate).<sup>13</sup>

**Table 6: Selected Fellows<sup>14</sup>**

	International Fellows (n and % of cohort)	NZ Fellows (n and % of cohort)	Total (n)
Cohort 1	21 78%	6 22%	27
Cohort 2	25 74%	9 26%	34
Cohort 3	28 68%	13 32%	41
Cohort 4	21 68%	10 32%	31
Cohort 5	34 72%	13 28%	47
<b>TOTAL (Cohorts 1-5)</b>	<b>129 72%</b>	<b>51 28%</b>	<b>180 100%</b>
Cohort 6 (to date – selection in progress) *	19 86%	3 14%	22

Source: Data set 1, EHF supplied data

Note: \* the selection process is in progress for Cohort 6, and we expect the number of Fellows in this cohort to increase in coming months. All currently selected Cohort 6 Fellows have deferred from previous cohorts.

<sup>13</sup> Calculated based on Cohorts 1-5 only, as gate 1 data not available for Cohort 6)

<sup>14</sup> Unless otherwise stated, we use the term 'selected Fellows' to refer to those that are selected and also join the cohort, ie totals do not include those that are selected and decline or defer to another cohort.



**Table 7: Good pool of compliant applications - number remaining after Gate 1, and number selected that also join each cohort**

	Compliant applications	Number remaining at Gate 1 (initial assessment)	Number joining the Fellowship (International Fellows and NZ Fellows)
Cohort 1	311	55	27 <ul style="list-style-type: none"> <li>• 9% of all compliant applications</li> <li>• 49% of those who got through Gate 1</li> </ul>
Cohort 2	172	109	34 <ul style="list-style-type: none"> <li>• 17% of all compliant applications</li> <li>• 31% of those who got through Gate 1</li> </ul>
Cohort 3	415	136	41 <ul style="list-style-type: none"> <li>• 10% of all compliant applications</li> <li>• 29% of those who got through Gate 1</li> </ul>
Cohort 4	251	121	31 <ul style="list-style-type: none"> <li>• 12% of all compliant applications</li> <li>• 26% of those who got through Gate 1</li> </ul>
Cohort 5	342	126	47 <ul style="list-style-type: none"> <li>• 14% of all compliant applications</li> <li>• 37% of those who got through Gate 1</li> </ul>
<b>TOTAL Cohorts 1-5</b>	<b>1,491</b>	<b>547</b>	<b>180</b> <ul style="list-style-type: none"> <li>• 12% of all compliant applications</li> <li>• About 33% of those who got through Gate 1</li> </ul>
Cohort 6 (to date)	352	N/A*	22

Source: Data set 2, EHF supplied data.

Note that percentages provide an indication only as they are based on a calculation of individual applicants from applications (some applications are for multiple individuals).

\* Cohort 6 selection process is in progress. All those Fellows that are currently selected for Cohort 6 have deferred from a previous cohort. We expect the number of Fellows in cohort 6 to increase in coming months.

Qualitative feedback from EHF suggests that the programme is attracting a high calibre of applicants, from New Zealand and abroad, and that interest in the programme from relevant applicants is **increasing**. EHF also note that as the quality of applicants is so high, rather than turning quality applicants down, they have opted to accept more Fellows than can be accommodated at a cohort Welcome Week and to ask some Fellows to defer to future cohorts. For example, the 22 Cohort 6 Fellows that have been selected to date are all deferred from Cohort 5, as EHF had reached its capacity for the number of Fellows that could be inducted through Welcome Week. EHF also has plans to run additional Welcome Week events to accommodate more Fellows in future cohorts and mitigate the flow on effect this strategy will have on overall numbers.

EHF strategies to ensure Welcome Week capacity does not result in quality applicants being turned down may not be well understood by stakeholders - qualitative feedback from other stakeholders revealed concerns that small cohort sizes means some good applicants aren't being selected.

## GIVs issued

Not all International Fellows need a GIV to access New Zealand. A GIV is not required for International Fellows who have the right to reside in New Zealand through their Australian citizenship, their partner or another visa category. Note that Permanent Residence holders are counted as New Zealand Fellows, not International Fellows.

In our Year 1 report we noted that the pilot was not tracking to use the full quota of GIV available (400), thereby limiting the quantum of potential outcomes, and increasing the per-GIV cost (p15 Y1 report).

We find that this trend continues. INZ data for Cohorts 1 to 5 shows:

- only 115 GIV have been granted



- there are 14 International Fellows without a GIV:
  - 4 have not yet applied for a GIV
  - 2 are awaiting a decision on their GIV application
  - 8 do not require a GIV (as outlined above).

If Cohorts 6 through 8 select similar numbers of International Fellows to previous cohorts, and if similar numbers of International Fellows can access New Zealand through other classes of visa, around half of the maximum potential number of GIV that are available will remain unallocated (400 GIV are available through the pilot). This effectively doubles the ‘per GIV’ cost.<sup>15</sup>

## Selected Fellows are diverse, but not as diverse as applicants

In our Year 1 report we noted that diversity of Fellows could be improved (p16 Y1 report) and that EHF had identified attraction processes as the key lever to do this (as selection is dependent on having a high quality pool, aligned to the objectives of EHF, to draw from) (p15 Y1 report).

Table 8, over page provides a breakdown of demographics for selected Fellows (all, International and New Zealand) and of all applicants.

Overall, we find that Fellows are diverse, but not as diverse as applicants. This is not necessarily negative, as EHF is selecting for quality as well as diversity, and quality of Fellows is not indicated by their demographic profile.

<sup>15</sup> Following patterns to date, we estimate that approximately 80 more International Fellows will be selected in Cohorts 6-8, and around 75 of these will require a GIV to join the Fellowship (ie those that don't have other classes of Visa / NZ citizenship / Permanent Residency).

<sup>16</sup> The data in this section is drawn from Data Set 2: EHF operational data – *applicant and Fellow demographics drawn from application forms*. This set contains a larger number of Fellows than other sets as it is an uncleaned, operational data set.

It is also too early to say what type of International Fellows or patterns of behaviour are likely to lead to the best outcomes for New Zealand.<sup>16</sup>

- **The vast majority of selected Fellows are entrepreneurs (86% of all Fellows).** Among the selected Fellows, only 14% are investors (29 Fellows), almost all of them are International Fellows (25 out of 29).<sup>17</sup> Investor applicants are more likely than entrepreneurs to be selected. All investor NZ Fellows were selected for Cohort 1 to 3; no investor NZ Fellows joined Cohorts 4 to 6.
- **Selected Fellows are more likely to be Male (61% of all Fellows).** Among International Fellows, the proportion of males has risen from 55% in Cohort 1, to 71% in Cohort 3 and to 70% in Cohort 5. The profile of NZ Fellows is different, with more than half being females: overall and in each Cohort except Cohorts 3 and 5. The proportion of selected Fellows that are male (61%) is lower than the proportion of applicants (70%), meaning female applicants are more likely than male applicants to be selected.
- **Most selected Fellows are aged 30-49 years old (64%), and the cohorts are getting older.** The age profile of selected Fellows largely matches that of applicants. The key exception is young applicants (age under 30 years) who are more likely to be selected for the Fellowship (17% of selected Fellows are under 30 compared to 11% of applicants). Cohorts 1 to 3 are “younger” compared to Cohorts 4 to 6. 23% of Fellows in Cohorts 1-3 are under 30 years old, compared to only 11% of Fellows in Cohorts 4-6. The share of Fellows over 50 years old has grown from 13% in Cohorts 1-3 to 24% in Cohorts 4-6. The dominant

<sup>17</sup> Here we refer to the Fellow category through which individuals apply to the Fellowship and the GIV (Entrepreneur or Investor). In practice, Fellows may operate in both ways – ie Entrepreneur Fellows may invest in New Zealand businesses and Investor Fellows may be involved in start-ups.



age group of 30-39 year olds has increased from 34% of Fellows in Cohorts 1-3 to 40% of Fellows in Cohorts 4-6.

- **The largest share of Fellows comes from North America.** 55% of International Fellows (83/152), and 42% of all Fellows (87/206)<sup>18</sup> are from North America, compared to just 29% of all applications. The proportion of Fellows from North America has varied across Cohorts but stayed over 30% (ranging from 32% of Cohort 2, to 61% of Cohort 1). The share of compliant applications from North America has been between 23% and 31%.
- Applicants from Eastern Europe and Southern Asia (including India) seem to be least successful with their applications:
  - Eastern Europeans make up 4% of applicants (74/1843), and none have been selected for any cohorts
  - South Asians make up 16% of all applicants (297/1843), but only 2% of selected Fellows to date (5 individuals spread across cohorts).
- **Selected Fellows are drawn from a variety of industries.** The most prevalent industry that selected Fellows work in is Financial services (27 Fellows or 13%) and Professional, Scientific & Technical Services (26 Fellows or 13%), followed by Other services (24 Fellows or 12%). This profile does not fully match the profiles of applicants, demonstrating the selection process favours some types of entrepreneurs (note that this is not a criticism). In addition, EHF report that 90% of International Fellows as at October 2019 had experience in the tech sector, and/or as founders (61% tech sector experience, and 29% founder experience beyond tech start-ups).

More insights about diversity of primary citizenship and Fellows' sector affiliation is presented at Appendix 2.

<sup>18</sup> Note that some NZ Fellows have Permanent Residency but are not Primary Citizens of New Zealand, and some International Fellows are Citizens of New Zealand / Permanent Residents.



**Table 8: Demographics of International Fellows compared to total pool of compliant applications and NZ Fellows – Cohorts 1-6**

Demographic	All compliant applications	All Fellows	International Fellows	NZ Fellows
Fellow type – investors and entrepreneurs	94% entrepreneurs 6% investors	86% entrepreneurs 14% investors	85% entrepreneurs (127 out of 152) 15% investors (25 out of 152)	93% entrepreneurs (51 out of 55) 7% investors (4 out of 55)
Age	Fairly even distribution across bands <ul style="list-style-type: none"> <li>under 30 year old (n = 202, 11%)</li> <li>30-39 years (n = 672, 36%)</li> <li>followed by 40-49 years (n = 591, 32%)</li> <li>over 50 year olds (n = 378, 21%)</li> </ul>	Slightly younger profile than applicants overall <ul style="list-style-type: none"> <li>under 30 year olds (n = 34, 17%)</li> <li>30-39 years (n = 76, 37%)</li> <li>40-49 years (n=56, 27%)</li> <li>50 year olds and over (n = 37, 18%)</li> </ul>	More than half are under 40 years old <ul style="list-style-type: none"> <li>under 30 year olds (n = 23, 15%)</li> <li>30-39 years (n = 60, 39%)</li> <li>followed by 40-49 years (n = 42, 28%)</li> <li>50 year olds and over (n = 27, 18%)</li> </ul>	More equal distribution over age groups than for International Fellows <ul style="list-style-type: none"> <li>under 30 year olds (n = 11, 20%)</li> <li>30-39 years (n = 16, 29%)</li> <li>40-49 years (n = 14, 25%)</li> <li>50 year olds and over (n=10, 20%)</li> </ul>
Gender	High proportion of male applications - 70% male	More balanced than the profile of applicants <ul style="list-style-type: none"> <li>60% male (123 out of 206)</li> <li>39% female (80 out of 206)</li> </ul>	Less gender balanced than the NZ Fellows <ul style="list-style-type: none"> <li>64% male (97 out of 152)</li> <li>Higher share of male fellows across all Cohorts</li> </ul>	Almost achieving gender balance <ul style="list-style-type: none"> <li>53% female (29 out of 55)</li> <li>Higher share of female fellows in all Cohorts but Cohorts 3 and 5</li> </ul>
Primary citizenship*	<ul style="list-style-type: none"> <li>29% of applications from North America</li> <li>Followed by 16% from Southern Asia (incl. India)</li> </ul>	Continues to be less diverse than applicants <ul style="list-style-type: none"> <li>42% from North America (87/206)</li> <li>27% from New Zealand (55/206)</li> </ul>	Much higher proportion from North America than applicants <ul style="list-style-type: none"> <li>58% from North America (87/152)</li> <li>Only 3% from Southern Asia</li> </ul>	N/A
Industry groupings	<ul style="list-style-type: none"> <li>Most applicants work in Other services (204), ICT sector (137) and Education and Training (97)</li> </ul>	<ul style="list-style-type: none"> <li>Most Fellows work in Financial services (27 Fellows or 13%) and Professional, Scientific &amp; Technical Services (26 Fellows or 13%), followed by Other services (24 Fellows or 12%)</li> </ul>	<ul style="list-style-type: none"> <li>Most International Fellows work in Professional, scientific and technical services (23 Fellows), followed by Financial services (22 Fellows) and Other (17 Fellows)</li> </ul>	<ul style="list-style-type: none"> <li>Most NZ Fellows work in Other services (7), Education and Training (6) and Public administration (5)</li> </ul>

Source: Data set 2, EHF supplied data. This set contains a larger number of Fellows than other sets as it is an uncleaned, operational data set; there are also discrepancies in some of the totals.

Note that this table includes Cohort 6 – most other data in the report only refers to Cohorts 1-5.





## Awareness of the GIV

Appendix 2 provides more detail of the routes through which international applicants become aware of the GIV and the factors that attract them to apply for the Fellowship. The following observations are drawn from survey data.

- We don't see substantive changes in the routes through which Fellows become aware of the pilot.
  - INZ and word of mouth/ referrals are the most important attraction sources for all cohorts. The EHF website (ehf.org) and social media was the third most common single source. Many applicants heard about the Fellowship from a combination of sources.
- The pilot is continuing to enable access for International Fellows, some of whom wouldn't otherwise come to New Zealand.
  - Almost half of International Fellows (28 out of 55, 51% [survey]) had been considering moving to another country instead of New Zealand. The GIV and the opportunity presented by the Fellowship are key reasons they chose New Zealand.
  - Around a third of International Fellows (18 out of 55, 33% [survey]) appear to have been positively enabled to choose New Zealand by the GIV. Of these: 11 hadn't previously considered New Zealand; 7 had considered NZ but weren't eligible for other visas.
  - However, more than a half (32 out of 55, 58%) *may* have come through another route if the GIV hadn't been available – saying they would have considered coming to New Zealand and might have been eligible for a different visa.

Concerns continue to be raised about features of the pilot that may deter or exclude otherwise high-quality candidates from applying, in particular financial requirements and application costs / cost of

accepting – which have increased significantly since Year 1 (discussed further on pages 25-26).

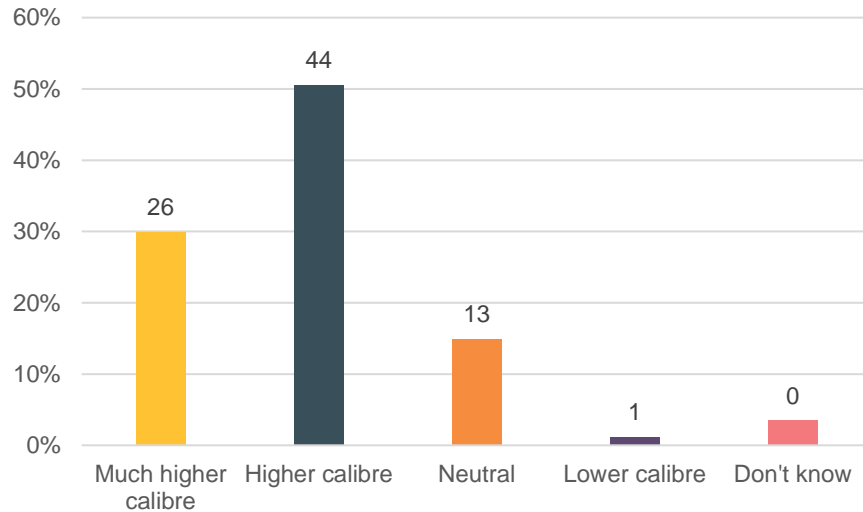
## Selected Fellows are perceived to be high quality

Consistent feedback was received that the cohorts and their members are high quality. Figure 1 shows that most ecosystem survey respondents rate the calibre of talent coming through the pilot as higher or much higher than the talent that is available locally. This feedback is elaborated on and confirmed in qualitative comments.

*They [International Fellows] are pretty impressive. People who in any context are an impressive group of people, a diverse group of people, in every sense of the word, talented, pretty successful. And from different ages and stages of life. [Ecosystem stakeholder]*



**Figure 1: Ecosystem – rating the calibre of talent seen coming through EHF/ GIV that isn't available locally**



Source: Data set 4, MartinJenkins Ecosystem survey, n=87

Several interviewees commented that they see variation in calibre:

- between International Fellows
  - some Fellows / Fellows' ventures are seen to be less obviously likely to deliver *economic* impact for New Zealand

*[The pilot has] some really strong people who definitely have all of the creds and are really valuable people. Some other people are ... more creative and unfortunately they are the ones that sometimes people in government will pick up on – all these*

*yoga, basket weaving people – EHF need to be careful to get the balance between the two types of people right. [Ecosystem stakeholder]*

- some Fellows are perceived to be 'here for the visa' and lacking commitment to deliver outcomes for New Zealand

*A lot of people are applying for GIV to get Permanent Residency, but in a few years they won't be staying and giving back to the community. It's a running gag within the fellowship that this is a millionaire club getting residency, a lot of jokes about it. Probably a perception problem... [Fellow]*

- between International Fellows and their NZ counterparts
  - International Fellows are generally seen to be of higher calibre.

*Calibre? 30%ish is kiwi people. And in general the calibre there is lower than international (some stand outs...). I'm ok with this, it feels like it is part of the deal. They are pulling from a small pool for kiwi entrepreneurs. This is part of mixing them in with the internationals – bigger pool [Fellow]*

At this stage, stakeholders are mostly willing to reserve judgement about whether this variation is good or bad for the success of the pilot. Stakeholders assume that EHF is considering the balance of skills, experience and sift-qualities of each cohort and of the Fellowship overall when they make selection decisions. They also assume that the Fellows (International and NZ) that they perceive to be lower calibre may bring qualities that they have not seen or that bring balance to the cohort overall.

*The pilot is an experiment about what the right balance between different types of people should be. This is about finding the right balance – right for NZ and right value. [Ecosystem stakeholder]*



# Application and selection processes

## Process managed by EHF

In Year 2, we find that application and selection processes for the Fellowship continue to be robust, transparent and well run by EHF. International and NZ Fellows rate processes very favourably (Figure 24, Appendix 2),<sup>19</sup> and only four selected Fellows were later denied a visa when due diligence checks were completed by INZ.

- 74/78 Fellows (95%) rate the availability of quality information about the EHF Fellowship as *good* or *very good*, and 71/78 Fellows (91%) rate robustness of the selection process as *good* or *very good*.

*I think the abundance of support videos along with multiple online open group sessions to have questions answered was good. Any query I emailed was answered in a complete and timely way. Each stage of the process was clearly documented and time lines were adhered to closely. Technology employed (ie surveys, video conferencing, uploads etc) worked well. [Fellow]*

- Fellows are also very positive about the depth of the selection process.

*It was the most thorough process I have ever been through (including all previous job applications I've undertaken). They gathered a lot of information, and then we were interviewed 3-4 times by different panels of people. We also had to provide 5-6 professional references, and ALL of these were contacted and interviewed for an hour each. I like how the focus was on your quality as a human being, your ethics and motivations, rather than purely on your achievement to date. [Fellow]*

## Process managed by INZ

International Fellows are also positive about the GIV application process managed by INZ (Figure 24, Appendix 2).

- Availability of information about New Zealand and about the GIV were also rated particularly highly (rated *good* or *very good* by 53/55 and 50/55 International Fellows respectively).

*It was pretty straight forward - Very easy to follow well explained instructions - I was able to process it myself without any help - The support was unparalleled that I have ever seen anywhere for visa, my case manager was in touch with me via email for any questions that they need more. I was talking to a person, not to a "one way IT System". [Fellow]*

## Integration of the processes

We also find that the two processes run by EHF and INZ are well integrated and 'smooth' from the applicant point of view, to the point where several Fellows do not distinguish between applying for the Fellowship and applying for the GIV.

*The process for EHF and GIV sort of seemed like one continuous thing, not two distinct events. That's not bad or good, just an observation. [Fellow]*

*I guess I don't see the difference, other than the compliance (ie, medical and FBI check) [Fellow]*

<sup>19</sup> The ratings are consistent with the last year survey: the responding Fellows ranked exactly the same aspects as very good or poor with similarly large majority.



## Financial costs of participation continue to be a concern for some Fellows

The area of least satisfaction continues to be financial cost:

- 9/79 Fellows (11%) rate financial cost of the application for the EHF Fellowship as poor
- 3/55 International Fellows (5%) rate financial cost of the application for the GIV as poor.

The cost of joining the Fellowship has increased significantly with the implementation of an Acceptance Fee (see Table 9). The Fellows believe that the high cost of application put off potential applicants (especially those who do not have established businesses) and may impact the diversity of applicants / Fellows.

*The EHF application is expensive to apply, and even more expensive if you are selected, which may limit the diversity of candidates. [Fellow]*

*The cost of applying, if unsuccessful, is high, and has put people I know off applying. [Fellow]*

*It seems very well suited for someone running a business (which is not me) but the cost is high for people who are self-funding. [Fellow]*

EHF report changing their pricing structure to “better support our operations, and based on feedback from Fellows on the value they are getting as part of the Fellowship programme as well as the value they receive from access to the Global Impact Visa.” There is also an expectation from government for the pilot to become self-funding over time.

The change of fees primarily impacts international applicants who are investors and more established entrepreneurs. The increase in acceptance fees associated with the pilot is likely to make the GIV inaccessible for some potential applicants, and has potential to increase the financial strain of migration for some successful applicants. Fellows also face costs associated with attending EHF events (for example, for registration and travel to-from New Frontiers). EHF offers a Scholarship to help mitigate the impact of fees.

Other areas for potential improvement are reported less consistently and are listed in Appendix 2.

**Table 9: Participation fees for Fellows**

	Fellowship Application Fee				Fellowship Acceptance Fee			GIV Fee**		
	NZ Entrepreneur	NZ Investor	International Entrepreneur	International Investor	NZ Both	International Entrepreneur	International Investor	NZ	International Entrepreneur	International Investor
Cohort 1 (2017)	\$212.50 NZD	\$750 NZD	\$850 NZD	\$3,000 NZD	NIL	NIL	NIL	N/A	\$0-\$470 USD***	\$0-\$470 USD***
Cohort 7 (Current)	\$200-\$300 NZD*	\$200-\$300 NZD*	\$350-\$500 USD*	\$1,000-\$1,150 USD*	\$950 NZD	\$4,950 USD	\$24,950 USD	N/A	\$0-\$470 USD***	\$0-\$470 USD***

Source: EHF website, accessed 27 November 2019; Notes: \* lower amount is for 'Earlybird' applications; \*\* fee set by and goes to INZ; \*\*\* amount varies by country



# IMPLEMENTATION: FOCUS ON INTEGRATION

This section on integration is the key focus of this year's report and examines Fellows' integration to New Zealand innovation systems and communities.

There is an assumption built into the design of the pilot that Fellows need to 'integrate' into New Zealand innovation systems and communities as a step towards delivering value and outcomes for New Zealand.

There are linkages and overlaps between this section and the following one (on early outcomes). In particular, 'connection' sits across both sections.

- As this report focuses on integration, 'connection' is discussed in depth in this section, with a lesser focus in the Outcomes section.

Feedback on integration has been drawn from:

- survey responses from all Fellows
- respondents to the Ecosystem survey
- interviews with Fellows and representatives of the Ecosystem: additional interviews were conducted to ensure breadth of feedback on integration.



## Achieving integration

Integration is a loosely defined concept within the context of the GIV pilot. It will manifest in different ways for different individuals. According to interviewees, indicators of a 'well-integrated Fellow' are internal and external (eg wider sector awareness and support for Fellows is an indication of integration). While this section looks at both types of Fellows (International and New Zealand), it primarily focuses on International Fellows and looks at:

- the extent to which Fellows are integrated, examining:
  - presence and intentions of International Fellows
  - connection and inclusion
  - International Fellows' understanding of the New Zealand context
- the induction and support provided by EHF
- how support could be improved.

### Integration is a shared responsibility, led by EHF

As illustrated in the Intervention Logic Model for the pilot, EHF has primary responsibility for Integration *with* a range of other stakeholders. The model assumes that EHF will provide proactive and ongoing support and advice to all GIV holders for the three-year visa period.

The model EHF are using for supporting Fellow integration is both EHF-led and Fellow-led:

- EHF sets the expectation that Fellows will support each other and creates regular events and platforms to catalyse connections and enable ongoing contact between Fellows
- Fellows support each other and the Fellowship by participating in and proactively initiating additional activities.

In addition, EHF provides direct support for Fellow integration through 1-1 and 1-many approaches.

## How integrated are Fellows?

### International Fellows' presence and intentions

The GIV differs from other visas in that it does not have requirements to spend time in New Zealand, and holders can travel in and out of the country as many times as they like before their visa expires. However, there is an expectation that GIV holders will engage with New Zealand, and that some of this engagement will involve being in the country. It is not known how much time in country is necessary to enable Fellow contribution, and how the frequency and amount of time differs for individuals.

### Presence: most International Fellows are not in New Zealand, few are spending significant time here

Transitioning to a new country takes time, and it is to be expected that many International Fellows will not yet have spent significant amounts of time here. INZ data shows that this is the case: few International Fellows are currently here; almost a half are spending less than 10% of their time here.

While the policy does not require GIV holders to be here, not being here may make it more difficult for International Fellows to make meaningful connections with the New Zealand innovation ecosystem. Qualitative feedback identified some of the ways integration can occur from overseas – we heard about International Fellows who are not based in New Zealand providing support to connect New Zealand Fellows from their cohort with their international networks and communities.



*[I've] just been in [overseas locations] and I had fellows lining me up with meetings before I got on the plane, picking me up from airport and spending the afternoon with me ... They do the warming up. I go in presold. I've never seen a networking structure like it – they are proactive in hooking us up. It is like we are connected to this family of connectors. They are incredible in their own networks ... [New Zealand Fellow]*

Table 10 compares time spent in New Zealand by International Fellows from different cohorts. Note that Cohort 1 has been in the Fellowship for around 2 years, while Cohort 5 was welcomed less than one month ago. The data shows:

- just over 10% of the International Fellows were in the country at the time the data was extracted – 13 out of 112 that were tracked in INZ data,<sup>20</sup> this is a big drop from the previous year's report when 65% of Fellows were in the country.<sup>21</sup>

- two-thirds of International Fellows have spent less than 10% of their time here since joining the Fellowship.
  - International Fellows from Cohort 2 continue to spend less time here than other cohorts (on average 10% of elapsed time) – Fellows from Cohort 1 are spending the most time here (on average 32% of elapsed time) followed by Fellows from Cohorts 3 and 4 (on average 18% and 17% respectively). Following early observations of Cohort 2, EHF placed more focus on selecting those able to spend time in the country – current data for Cohorts 3 and 4 indicates that this was successful.

**Table 10: Time spent in New Zealand by International Fellows - comparison across cohorts**

	Cohort 1	Cohort 2	Cohort 3	Cohort 4	Cohort 5
Approx. time since Welcome Week	24 months	19 months	12 months	6 months	1 month
Who's here right now?	3/21	1/25	3/23	4/19	2/24
How many days have they spent here? (days since Welcome Week)	277 days on average (= 32% of total days elapsed) (median of 93 days here)	73 days on average (= 10% of total days elapsed) (median of 21 days here)	89 days on average (= 18% of total days elapsed) (median of 25 days here)	61 days on average (= 17% of total days elapsed) (median of 18 days here)	12 days on average – (median of 11 days here)
How often are they coming?	19/21 have come 3+ times 2/21 have come once	11/25 have come 3+ times 7/25 have come once	3/23 have come 3+ times 10/23 have come once	1/19 have come 3 times 10/19 have come once	24/24 have come once

Source: Data set 3, INZ supplied data, data extracted 1 November 2019, n = 112

<sup>20</sup> INZ data was extracted to cover the pilot period up to 1 November 2019, 'currently here' was as of 1 November 2019.

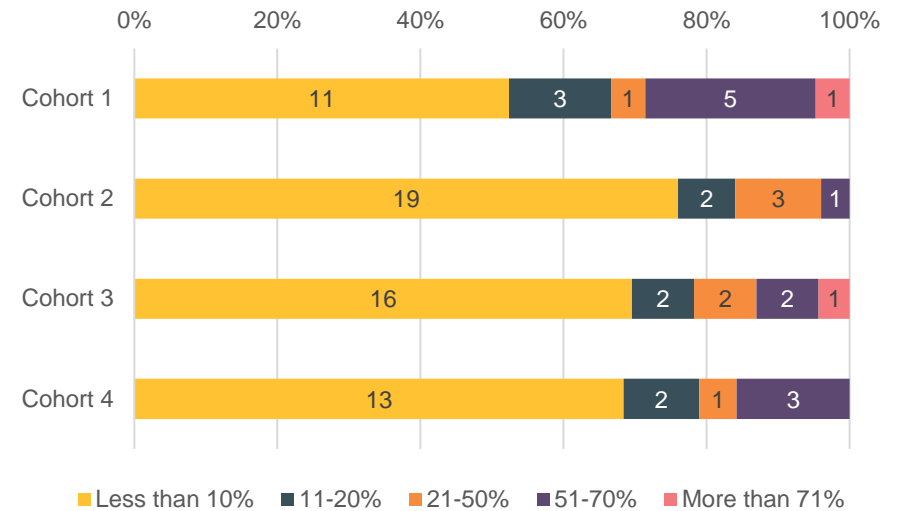
<sup>21</sup> Last year's number would have been inflated by the timing of the data extraction, right on Welcome Week; this year's data was extracted three weeks after Welcome Week – at which point only three of the Cohort 5 Fellows were still in the country.



Figure 2 compares the proportion of time International Fellows in each cohort have spent in the country.

- Two-thirds of International Fellows (59 out of 88) have spent less than 10% of their time in New Zealand (since their Welcome Week).
- Only 15% of International Fellows (13 out of 88) have spent more than 50% of their time in New Zealand.
  - Cohort 2 International Fellows have spent the lowest proportion of their time in New Zealand – 19 out of 25 having spent less than 10% of their time here. The majority of International Fellows from Cohorts 3 and 4 have also spent less than 10% of their time here.
  - Cohort 1 International Fellows have spent proportionally longer here than the other cohorts – 10 out of 21 have spent more than 10% of their time here.

**Figure 2: Proportion of time spent in New Zealand to date, International Fellows Cohorts 1-4 (%)**



Source: Data set 3, INZ supplied data, data extracted 1 November 2019, n = 88





## Presence: a minority of International Fellows have chosen to make New Zealand their home

The Fellows' survey asked specific questions about settlement in New Zealand and intentions for the future: 17 out of the 88 International Fellows that responded to the survey reported they have 'made NZ their main home since joining EHF'. These Fellows are showing high levels of commitment to New Zealand. Of the 17 who made New Zealand their main home:

- 11 have brought family with them and 2 intend to in future (the remaining 4 do not have a spouse or dependents)
- almost all intend to apply for Permanent Residency (15/17).

## Intentions: International Fellows who have not settled plan to spend more time here

In contrast to the limited time International Fellows have spent in the country to date, most Fellows intend to spend significantly more time here in the future.

Figure 3 shows that 37 out of the 40 International Fellows who have not yet made New Zealand their main home are planning to have a substantive presence here in the future.

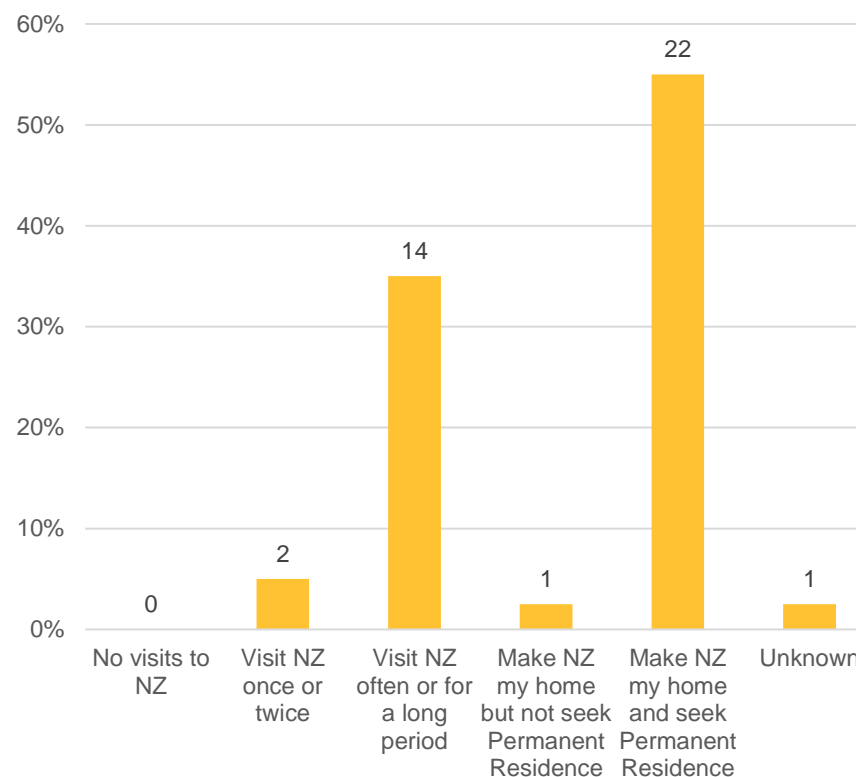
- Around half indicate positive intentions to make New Zealand their main home and seek Permanent Residency (22).
- Around a third plan to visit often or for a long period in the next five years (14).

Fellows may or may not be able to follow through, given the practical barriers to relocating identified by Fellows (see below).

A small minority of Fellows indicate that they only plan to visit once or twice in the next five years (n=2). As noted above, a lack of physical presence will

not necessarily inhibit them from integrating in New Zealand innovation ecosystems and communities.

**Figure 3: Intentions for next five years of International Fellows who have not yet settled to New Zealand**



Source: Data set 4, MartinJenkins Fellows survey, n=40



## Barriers and enablers for spending time in New Zealand

Factors that have **INHIBITED** Fellows from migrating or spending more time in New Zealand include changes in personal circumstances; taking longer than anticipated to prepare themselves and their businesses for the move; ongoing commitments abroad; and the policy settings in the New Zealand business environment.

- Changes implemented in Year 1 mean the selection process now places more emphasis on Fellows being able and motivated to spend time in New Zealand. Nonetheless, unexpected changes in circumstances will occur.
- Many Fellows have established businesses in their home country, and it can take longer than expected to make arrangements to move that business to New Zealand or to ensure it can continue to operate without the Fellow present.
- Many Fellows continue to be active in international networks, which can either take them away from New Zealand if they have migrated here, or poses a barrier to making New Zealand their home.

*On my end everything has completely changed since joining the program: I left my existing fund (to start a new one in a totally different focus area), I moved [location]... for unforeseen family reasons, I had a child, etc. [Fellow]*

*[Barrier]... the need to be present for events and forums across the globe. [Fellow]*

*Still finalizing some pieces internationally to put in place before coming. [Fellow]*

On the other hand, Fellows described three key **ENABLERS** for migration and spending more time.

- The GIV itself is the key enabler, providing access for Fellows, access to other visas for their family members, the flexibility to come and go, and the potential for future access to Permanent Residency.

*... Because I have a family here [overseas location], the flexibility of the program was critical for my ability to get involved and build a foundation before arriving. [Fellow]*

- The Fellowship provides a readymade community that is attractive to many Fellows.

*I've resisted [moving to NZ] since I didn't know how I could integrate into the larger society ... EHF offers the opportunity to make such a move possible. Moving from so far away is overwhelmingly difficult without an infrastructure to fall back on ... EHF offers the possibility to grow our professional connections far wider than we might otherwise by staying exclusively in [overseas location]. [Fellow]*

- Practical advice helps Fellows to tackle the logistics of the move.

*The EHF team was very helpful and supportive by providing answers, guiding and access to resources for every question I asked, in a very responsive time manner ... resources for settling down in NZ ... webinars about the practical steps that I need before/ when I come to NZ such as opening the bank account, understanding the Eco-system... [Fellow]*



## Connection and inclusion

'Connect' is also discussed in the Outcomes section where we report:

- it is a domain of relatively high impact according to Fellows' self-assessment (41%).
  - But this year **more** Fellows rated their contribution to CONNECT as *low* or *very low* (compared to last year).
- ecosystem feedback is positive (48% report seeing Fellows make connections) – the ecosystem reports seeing International Fellows make stronger connections than New Zealand Fellows.

This section looks at the connections that enable integration: connections between Fellows, and the professional and social connections being built.

## Connections to other Fellows

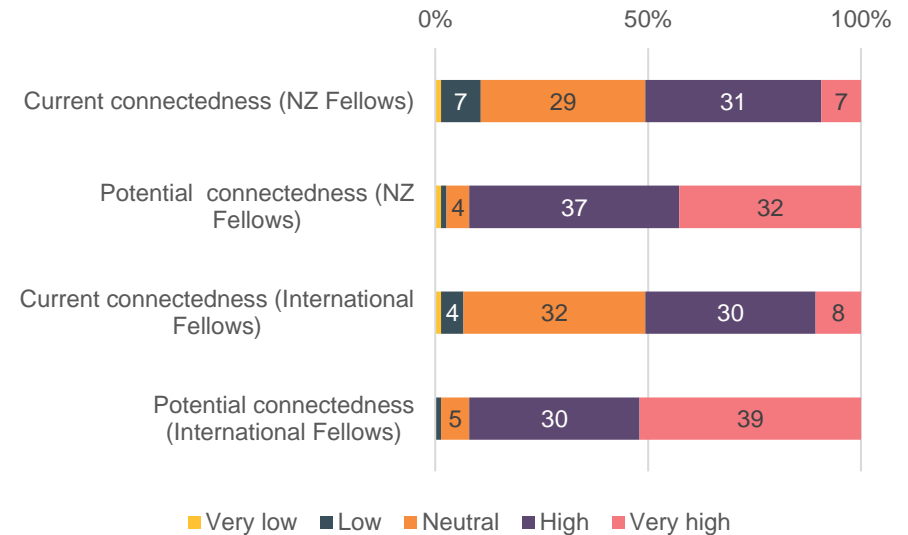
### INTENTION

Fellows are expected to be well connected with each other. The Fellowship is a core component of the design: connecting with entrepreneurs of 'world class' quality through the EHF Fellowship is one of the key dimensions of the pilot that has attracted both International and New Zealand Fellows. The intention is that through these connections Fellows will receive practical and collegial support, access to broader networks (within and outside New Zealand) and that connections will potentially lead to collaborations.

*The very existence of the fellowship has provided access to a treasure chest of collective knowledge, wisdom, networks and resources. The world class quality of entrepreneurs both locally and internationally has given social entrepreneurs like myself such great exposure. [Fellow]*

Figure 4 shows that half of Fellows report having 'high' or 'very high' levels of connection with other Fellows.

**Figure 4: Fellows' connectedness to each other**



Source: Data set 4, MartinJenkins Fellows survey, n=109

Qualitative feedback suggests that Fellows are generally better connected to others within their Cohort and to Fellows with whom they share geographic proximity and/or sector focus. There are indications that not all Fellows make full use of the available opportunities for connecting with each other and feedback from some Fellows suggests they feel less connected with others in the Fellowship than they had expected.

*A core of about 10 of us [of a specific Cohort] are really in fellowship. We worked at it, and we keep working at it, and we're keeping in touch. I feel sorry for fellows who don't make the most of that experience –*



*[connecting] made it more impactful for me. The EHF does a good job of keeping in touch and arranging opportunities for reunion, which is really helpful, too. [Fellow]*

## Professional connections

### INTENTION

As a group, Fellows are expected to be connected with regional entrepreneurial ecosystems, Economic Development Agencies, businesses and emerging ideas. Not all Fellows are expected to connect with all parts of the innovation ecosystem – connections will be driven by what is relevant to their ventures and aspirations.

Survey data indicates Fellows' connections (see Figure 5) are strongest in areas more typically aligned with innovation (eg business and social enterprises), and weakest in areas less traditionally associated with innovation (eg government and academia).

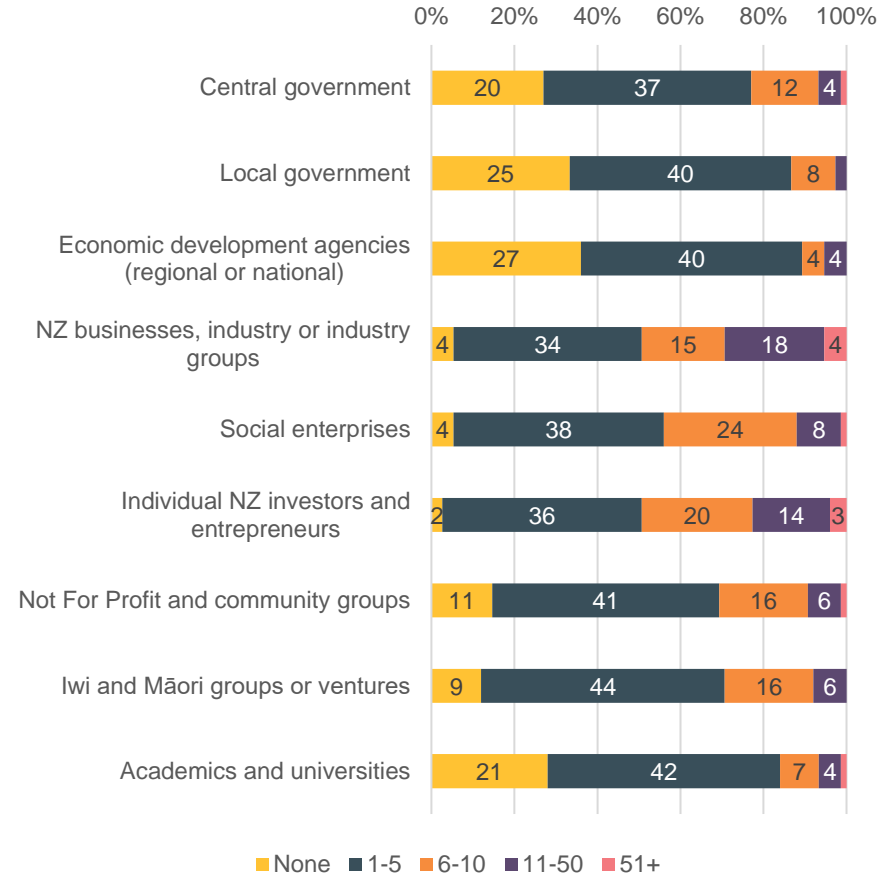
- Fellows are **most likely to be connected** with:
  - individual NZ investors and entrepreneurs (50% 6+ connections)
  - NZ businesses, industry or industry groups (49% 6+ connections)
  - NZ social enterprises (44% 6+ connections)
  - Fellows have the most connections with those they find it **easiest** to connect with:
    - NZ social enterprises (79% very easy or easy)
    - NZ businesses, industry or industry groups (72% very easy or easy)
    - individual NZ investors and entrepreneurs (68% very easy or easy).

- Fellows are **least likely to be connected with**:
  - Economic Development Agencies (36% no connections)
  - local government (33% no connections)
  - academics and universities (28% no connections)
  - central government (27% no connections)
  - Fellows identified government as **the most difficult** to connect with:
    - local government (20% said it was very hard or hard to connect with)
    - central government (19% very hard or hard to connect with).

Only one Fellow (a New Zealand Fellow) reported that they had not made any new connections with actors across any of the groups asked about in the survey since joining the EHF Fellowship.



**Figure 5: NZ innovation ecosystem and community connections since joining the Fellowship (Cohorts 1-4)**



Source: Data set 4, MartinJenkins Fellows survey, n=75. Cohorts 1-4 only.

**Social connection**

**INTENTION**  
 Professional connections are only one piece of the puzzle for International Fellows, and especially for those who bring spouses and families to New Zealand with them. Social connections, inclusion and ‘feeling settled’ are also important components of integration.

*Integration is quite a subtle feeling ... the family is the lens for the integration challenge. If the family sees itself as fully satisfied with all aspects of life here ... this will be the main indicator. [Fellow]*

Survey and interview feedback indicates that some Fellows are finding social integration for themselves and their families slow and sometimes challenging. Common themes relate to:

- challenges choosing an area/neighbourhood to live and accessing secure housing
- challenges choosing a school and understanding how the NZ schooling system works
- lack of opportunities to meet people in local area, for family and spouses

*For social – we need more local events to co-start our connections. In business it is no problem. Already I have made a lot of business acquaintances. My wife is not making as many friends as I would wish. We need more local events including families. The spouse crowd it is going to be very useful. [Fellow]*

- spouses struggling to find work, and therefore feeling less settled here
  - some Fellows report that NZ employers are less inclined to employ people on temporary visas



*We are learning for my wife that it is hard for someone who doesn't have permanent residence to get work, even with a visa that allows you to work. That has been frustrating. Employers are not open [Fellow].*

- some Fellows / spouses have experienced discrimination.

*We moved to the region in part because we loved it and in part because MBIE wants people to go there [and also a good place for the project]. But regions are quite conservative and if you are not of European descent, if you do not look like a white New Zealander, there are things that are not pleasant. There needs to be more of that preparation – something beyond the marketing brochure. [Fellow]*

## Depth and potential value of Fellow's connections across New Zealand

### INTENTION

Fellows are expected to be located across and engage in regions, leading to benefits for communities and regions – including exposure to new ideas, connections, skills and experience, and positive social impact.

The location of International Fellows while in New Zealand gives insight to who from the local innovation ecosystem will be able to 'see' and connect with Fellows.

- Only a small number of International Fellows (17) report having made New Zealand their main home, those that have settled are relatively well spread across the country.
  - 11 of the 17 gave home addresses in New Zealand:
    - 7 in the North Island (including four in Auckland)
    - four in the South Island (including three in Canterbury).

- Early Outcomes (as outlined later in the report) also indicate that the Fellows are active in a range of locations: mostly in the main centres, but with connections in other regions as well.
  - To date, Fellows have created 114 jobs across **9 regions**, although predominantly in Wellington and Auckland.
  - Fellows have created organisations across **16 regions** of the country, with most in Auckland, Canterbury and Wellington.
  - Fellows have invested in organisations across **11 regions** of the country, although most are in Wellington and Auckland.
  - Fellows helped raising capital for organisations located in **16 regions** of the country. However, the great majority of these organisations are located in Auckland and Wellington.

### Ecosystem awareness of Fellows

Feedback on Fellows was sourced from the ecosystem through interviews and a survey. It is important to note that this feedback was targeted, with both the survey population and interviewee lists provided by EHF. As a result it can't be assumed that this feedback is representative of the entire innovation ecosystem.

Ecosystem feedback echoed that of Fellows: they are seeing Fellows making good connections, the strongest being with non-government organisations in the main centres.

- Interviewees had met differing numbers of Fellows: ranging from up to a third of International Fellows to not having met any in person.
  - They had met Fellows through New Frontiers and through personal meetings; most had knowledge about Fellows from reading information EHF puts out (list and website).



- Survey respondents knew at least one EHF Fellow, and most report knowing both New Zealand and International Fellows.
  - 64% said they knew both International and New Zealand Fellows
  - 30% only knew International Fellows
  - 5% only knew local Fellows.

*Fellows typically do not approach [us] directly; this is probably cultural: where they come from, the world works through referrals. [ecosystem stakeholder interview]*

Ecosystem survey respondents were:

- spread across regions (all regions were represented by at least one respondent)
  - most were located in the main centres (25% work in Wellington and 16% work in Auckland)
  - just over half said they worked internationally.
- mainly from non-government sectors
  - 35% identified as 'business, industry or industry group
  - only very small numbers of respondents combined described their organisation as being 'Central government', 'Local government' and 'Economic development agency' (16% across all three categories).

### Enabling ecosystem connections

Connection is a two-way process, and ecosystem stakeholders also provided feedback about the things that had enabled and inhibited them making connections with Fellows.

- Enablers include:
  - the profiles that EHF creates to introduce new Fellows: many stakeholders 'always' look through these when a new cohort is released, for interest and in search of individuals they may want to meet
  - New Frontiers event, although some said these events are 'not for everyone'
  - the City Business Orientation Day in Christchurch provided an excellent mechanism for connecting Fellows with the local ecosystem
  - some stakeholders in the wider-system have actively reached out to support International Fellows that they have a connection with, eg WREDA
  - having a specific project to work on together, or commission from a Fellow.

*Would have met around 30% of them. I read the list every time it comes out, but also see them at new frontiers – but the latter is more time consuming, do not attend it often, no use for me. On the list, I look at who is there on the list and who is relevant for us, trying to activate and connect with them. [Ecosystem stakeholder]*



## International Fellows' understanding of the New Zealand context

### INTENTION

Understanding how to operate in the local environment is an enabler of progress and an indicator of integration. It takes time to learn about the values, practices and systems that underpin any country and/or culture. Accelerating this learning curve through induction and integration support is fundamental to the value proposition of the pilot.

In the Early Outcomes section, we look at Fellows' perception of their own progress. While half report that their progress has been at least as fast as they expected, nearly a third have found progress to be slower than expected.

Qualitative feedback indicates that most Fellows are building a deeper understanding of the context for innovation and entrepreneurship in New Zealand, but that this is an ongoing journey that may include setbacks along the way.

The areas most frequently identified by International Fellows as important to understand are:

- Māori culture and values, and te Tiriti o Waitangi
  - the prominence given to this during Welcome Week highlights this as something of high importance for Fellows; some have found a disconnect between what is presented at Welcome Week and the reality of daily life in middle-New Zealand

- the culture of business in New Zealand – including openness (or not) of business to collaborate, pace and preferred communication style, and logistics of setting up a business here
  - Fellows have found the business culture in New Zealand to be quite different to what they know, and that it is taking time to understand and adapt to
- the fit of the GIV and the pilot within the government's wider agenda for innovation and the outcomes expected from the pilot.

*[The support I have found most helpful is] Definitely the increased awareness of Māoritanga... We organised a workshop with our team on kapa haka, waiata and tikanga Māori as a result of the EHF experience and we are looking at Aotearoa with a different, broader lens. [Fellow]*

*What can we do given our vast diversity as leaders, creators, investors and business developers to help New Zealand? Can we be given specific goals that New Zealand would like us to contribute? There is a wonderful pool of inventive and globally connected individuals---what would New Zealand like for us to support to gift the country? [Fellow]*

*Direct interaction with INZ and MBIE with respect to expectations would be helpful so that we can understand first hand what is important to INZ and MBIE and how we can work together. [Fellow]*





## Induction and other support provided by EHF and the Fellowship

### INTENTION

The model assumes that EHF will provide proactive and ongoing support and advice to all International Fellows for the three-year visa period.

EHF's model for supporting Fellow integration is primarily based on the Fellowship, which is both EHF-led and Fellow-led.

To support integration, EHF sets the expectation that the Fellowship will be an active and cooperative network, that supports itself. They create regular events and platforms to catalyse connections and enable ongoing contact between Fellows.

*The EHF Fellowship is a self-driven experience, and the community is built and supported by Fellows. The EHF team provides the platforms and creates the environment for Fellows to connect with one another and support one another meaningfully. [EHF website]<sup>22</sup>*

It is assumed that a high calibre and diverse group of well-networked Fellows will have enough knowledge, expertise and connections to support each other professionally and personally. Including New Zealand Fellows is an important design feature to improve the relevance and capability of the Fellowship to support NZ integration. The Fellow-led component of the model relies on Fellows:

- understanding and buying-in to the expectations of them
- participating in EHF-led events and platforms

- proactively calling on and responding to each other's requests for support.

### What support for integration does EHF and the Fellowship provide?

EHF has a small team and limited resources and they are generally thought to be delivering a lot to support Fellow integration and achieving efficiencies through use of online and 1-many models. EHF provides:<sup>23</sup>

- direct assistance to support Fellow integration, through 1-1 and 1-many approaches, including induction events (such as Welcome Week)
- provision of general information and tailored advice (for example, about moving to New Zealand)
- introductions and brokering connections proactively and on request (including New Frontiers and City Orientation events).

Possibly less visible to Fellows, but also an important enabler of integration, EHF also promotes the Fellowship to ecosystem stakeholders across New Zealand, and brokers access to Fellows for those stakeholders.

The Fellowship itself initiates its own communications, local meet-ups and online tools for communication.

<sup>22</sup> FAQ section accessed 27 November 2019

<sup>23</sup> Key events and activities that EHF has organised or brokered are listed at the front of the report 'Delivery of the pilot to date'.



## Fellows value the support provided by EHF and the Fellowship

### EHF support

Welcome Week was frequently identified as an effective way to be inducted to New Zealand and to begin the process of integration. Welcome Week and New Frontiers are important for Fellows and cohorts to get to know each other and to begin to build networks. The focus on Māoritanga has been emphasised as particularly eye opening, useful and well delivered.

*The quality of the Māoritanga education is world class and should be offered to all NZ immigrants. [Fellow]*

*The cultural integration team in our welcome week was amazing. As newcomers to a land that has experienced colonialism it's important that we understand a Māori perspective and do not replicate a colonialist mentality in our move to New Zealand and ventures. [Fellow]*

Fellows are also positive about the proactive and reactive introductions they receive through EHF staff members, and the breadth and depth of connections resulting from events like New Frontiers. Many survey respondents highly value the connections and networks that EHF provide as they help Fellows to develop and pursue their ventures.

*EHF as an organization has been supportive with sharing their network whenever I actively asked them for support. [Fellow]*

*EHF has been very helpful providing initial contacts with individuals and organisations related to our projects... introductions to the regional Economic Development Agencies ... have been helpful to let us use the assistance from those organisations. [Fellow]*

*The EHF programme has been the main driver in connecting myself and my endeavours into the ecosystem. It's created a ton of opportunity. [Fellow]*

*The support that has been most relevant and useful to me has been the connections to fellows and the broader ecosystem. Without much of a pre-existing network in NZ, this has been absolutely crucial for me to navigate the sector as an outsider. [Fellow]*

EHF support is seen as responsive and ongoing.

*Quick and helpful responses to any requests, practical or more philosophical. Proactive in connecting with relevant contacts and networks. Positive staff, impact-driven and supportive. [Fellow]*

International Fellows provided mixed feedback on the value of information and advice EHF provides on settling in New Zealand, with some finding it more useful than others.

### Support from other Fellows

The number, calibre and diversity of Fellows, the inclusion of New Zealand Fellows and the culture of cooperation and support within the Fellowship all enable Fellows to broaden their professional networks. Fellows find a lot of value from the support of the community of Fellows, professionally and personally, within and across Cohorts.

*This is an open community where supporting each other is the first priority. We all have personal goals---but as a community we find our connection to New Zealand and the purpose of EHF to create Global Impact is at the heart of everyone's work. [Fellow]*

*Knowing that the actual EHF team is tiny, I understand their capacity limitations to try and service / support the growing community of fellows. The most useful support has been from other fellows themselves. [Fellow]*

*The willingness to get in and help when you ask for something is great. And not just from within your own cohort - it may come from anywhere. [Fellow]*



After induction, the Fellowship is a key source of ongoing support for International Fellows to ‘crowdsource’ knowledge and increase their understanding of New Zealand, particularly from New Zealand Fellows.

*I've received plenty of support in terms of understanding the different regions of the country and what each has to offer for myself and for my business. I undertook a tour of the whole country last year for exactly this purpose and could rely on the guidance of NZ fellows throughout. [Fellow]*

*I think the ability to problem solve with other fellows at Fellow Hui Gatherings has been the most useful along with continued mentorship from EHF fellows in between gatherings. [Fellow]*

*Having a good number of New Zealand fellows in each cohort is key. Talking with and learning from them is really key to figuring things out. [Fellow]*

Some Fellows are finding that they can also build their understanding while offshore by connecting with New Zealand Fellows and businesses.

*1) While still based in [overseas location], I've spent regular time in-country developing meaningful insight and high-trust relationships. 2) I've designed bi-lateral contribution relationships with New Zealand entities-- I contribute to some, and others contribute to my [overseas location]-based projects. This two-way street is of mutual benefit and makes the value exchange sustainable in my view. [Fellow]*

While Welcome Week helps to accelerate Fellow learning about New Zealand, time in country, relationships and first-hand experience remain important for developing a depth of understanding.

*... we realize there is a strong need to understand the local systems and build trust. Also to do that it's better to be based in NZ, and my team and I are going and coming so that also makes it harder. [Fellow]*

*New Zealand is a very unique community-oriented country. We had a great opportunity to have a very close connection to the [sector] community and [sector] education centres which enable us to develop and make a world-leading product. [Fellow]*

International Fellows also value the support, advice and insights they have had from New Zealand Fellows to settle in New Zealand.

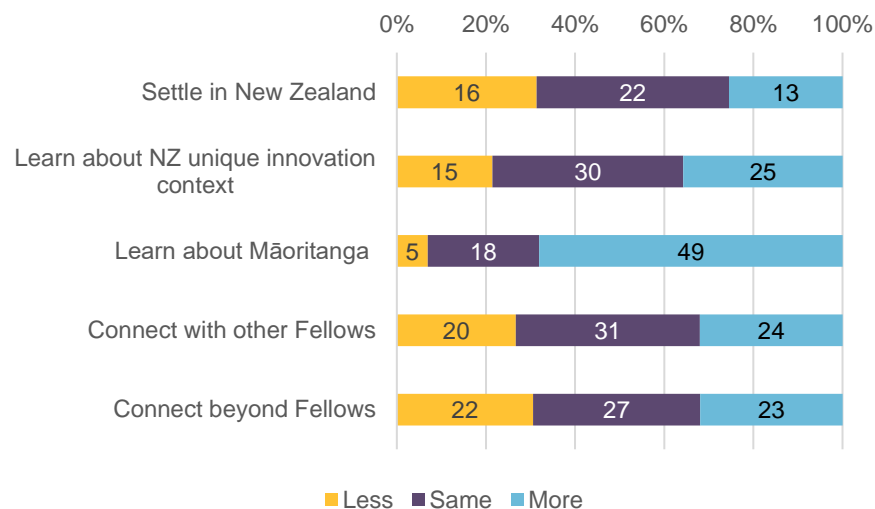
*[From New Zealand Fellows I have received] Much support; from housing to restaurant recommendations, people have been so welcoming. [Fellow]*

## Support meets the expectations of Fellows

Cohorts 1-4 Fellows were asked to compare their expectations regarding the support provided through the EHF Fellowship to their actual experiences (Figure 6). In all areas asked about, most Fellows report that the support they received is the same as or exceeds their expectations. This is especially true with regard to learning about Māoritanga, for which three quarters of Fellows report receiving a lot of support.



**Figure 6: Proportion of Fellows reporting that EHF integration support received in areas is less than, same as or more than expected (Cohort 1-4 Fellows)**



Source: Data set 4, MartinJenkins Fellows survey, n=51-79

A mixed group of Fellows reported receiving less support than they expected across the areas; ie the data does not suggest a core group of Fellows has unmet expectations across all areas of EHF support. However, there is a considerable overlap in those that report receiving less support than they expected in some dimensions:

- to connect beyond Fellows, and to settle in New Zealand (12 Fellows)
- to connect beyond Fellows, and to connect with other Fellows (12 Fellows)
- to connect beyond Fellows, and to learn about the unique context for innovation and entrepreneurialism in New Zealand (10 Fellows).

For the most part, Fellows' unmet expectations seem to be an indication of them wanting more or different support to thrive and meet their potential. However, in a small few cases it is indicative instead of feeling misled.

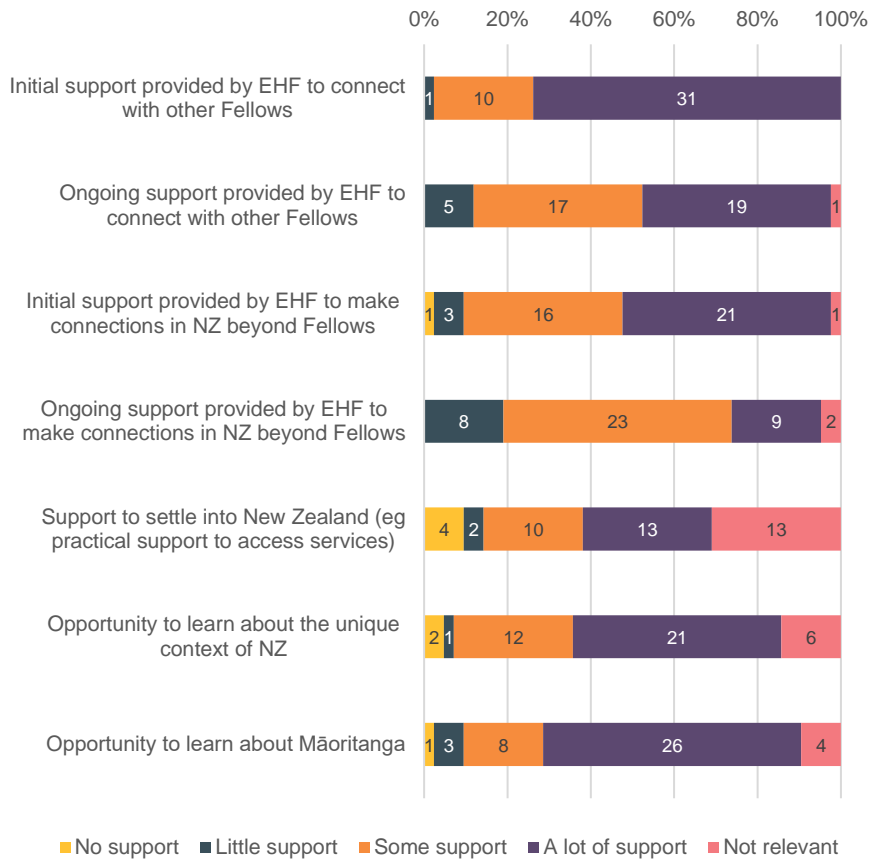
*I was surprised to find much less community and support when I arrived. EHF had marketed itself as a community builder and incubator, but really turned out to be a network - a very valuable [network] at that, but I perceived their communications to have overpromised on what they actually offered. [Fellow]*

*More information could possibly be available as to the 'meaning' of EHF / requirements of Fellows - however, I am conscious that this is something that we, as Fellows, are building and creating, so it's not necessarily that straightforward. I think that we have an opportunity to grow this for future years. [Fellow]*

Cohorts 5-6 Fellows were asked what support they expect to receive through the EHF Fellowship (Figure 7). The majority of Fellows expect to receive initial support to connect with other Fellows (74% expect a lot of support) and to learn about Māoritanga (62% a lot of support). 15% of Fellows expect no support or little support to settle into New Zealand. 19% of Fellows expect little ongoing support from EHF to make connections in New Zealand beyond Fellows.



**Figure 7: Support that Cohorts 5-6 Fellows expect to receive through the EHF Fellowship**



Source: Data set 4, MartinJenkins Fellows survey, n=42

## Ecosystem perspective of integration support provided to Fellows

Ecosystem stakeholders provide a different perspective on the support provided to help Fellows to integrate. Their feedback indicates desire for a much more proactive model of integration. They use words like ‘underutilised’, ‘unsupported’ and ‘potential’ to describe the Fellowship and call for systematic ‘aftercare’ and ‘activation’ to maximise its potential.

*The aftercare needs to be designed – that is missing at the moment. [Integration is] effectively being delivered by [one person]. At the beginning when it was set up, it was an exciting idea: let’s see if people are interested. The far-off thing you had to do was aftercare. It wasn’t not thought about, but not designed. The immediate problems were attracting the right people... We need an intensive after care system that activates them, integrates them, engages them. [Ecosystem stakeholder]*

*The bit of the pilot that focuses on activating the network is very basic. I don’t know why that is. [Ecosystem stakeholder]*

Many interviewees see the integration and activation of Fellows as a responsibility that should be shared across a number of government agencies. We discuss potential roles later in this report (see Implementation: The Public-Private Partnership from page 50).

## How could support provided to Fellows be improved?

In 2019, the EHF team’s focus was on financial resilience and ensuring the survival of the programme, following discussions with the government in February 2019. EHF report that they see potential to further activate Fellow contributions, both with more resources, and as they learn through experience more about what methods work best.



Fellows made a number of suggestions to improve their ability to integrate and make progress on their projects.

## Facilitation of introductions and connections

See Figure 6: *Connect beyond Fellows; Connect with other Fellows* = areas most Fellows reported receiving less support than expected

### More structured matchmaking and introductions between Fellows

- Proactive and purpose-driven connection of Fellows who could collaborate.

*Eventually, to be put in touch with impact investors. I guess there are two classes of fellows: those seeking funding for their unique, impactful ideas and projects; and the investors, looking for impact or profit-making investments. Connecting the two groups in an intentional, comprehensive way could be quite powerful. [Fellow]*

*Perhaps more direct involvement and initiative in connecting opportunities and talent, linking up the ones with need with the ones with resources, would be significant. [Fellow]*

*[The support I would like to receive is] More facilitated introductions between fellows who can help one another and collaborate with one another. It would be very helpful if someone at EHF played more of an active network coordinator role. These potential collaborations could increase the impact many of the fellows would be able to carry out. [Fellow]*

*[The support I would like to receive is] More proactive assistance in connecting Fellows with like missions/ goals so that we can collaborate across cohorts in a more concerted fashion. [Fellow]*

### More structured approach to introducing Fellows to the ecosystem

Both Fellows and ecosystem stakeholders say that more could be done to raise awareness of the pilot outside of the main centres and sectors. Opportunities are seen for greater activation of the Fellowship through structured, systematic and purposeful introductions of Fellows to relevant agencies, businesses and other ecosystem actors.

*More concierged connections with government would be nice.to help line up my work w/ govt interests. [Fellow]*

*Would be great to have a stronger network with the various other govt groups supporting innovation. [Fellow]*

*Willingness to partner with New Zealanders to do shared work. Introductions to people internationally to further NZ business. [Fellow]*

While most feedback has been positive about the value of the EHF brand, not all Fellows have had this experience.

*Positive: The business and individual connections have been most valuable. The name recognition of the EHF fellowship has also been useful. When we make introductions, the other people view us as already being vetted by the selection process. [Fellow]*

*Positive: Doors open when I mention I'm a part of the Edmund Hillary Fellowship. [Fellow]*

*Negative: When I ... introduce that I am an EHF fellow, people have no idea what that means and don't get the context... [Fellow]*

Ecosystem stakeholders identified a range of barriers to them engaging with Fellows, including:

- not knowing *how* to engage with the Fellowship – what support to offer, what collaborations are possible
- difficulty engaging with EHF:



- seeing them as understaffed and too stretched to have time for relationship building 'catch up' coffees
- perceiving EHF and by association the Fellowship, to have a certain style that is off putting to some (but attractive to others)
- prohibitive financial and resource costs to engage, for example to host significant events and to access the Fellow database through catalyst sponsor arrangements
- lack of presence (of EHF and Fellows) in regions, and lack of follow on from events.

*EHF built the mountain with New Frontiers events by requiring the ecosystem and fellows to go there to be integrated and get in contact. I am not interested in going there, but I want to know who is coming and what for and be able to connect without having to have a coffee with every single fellow. [Ecosystem stakeholder]*

*EDAs don't know how to tap in. If we had a way to match some of the skills already in the network everyone would be able to add value to a whole lot of businesses and firms. [Ecosystem stakeholder]*

## Additional support to understand the New Zealand context

See Figure 6 above: *Learn about NZ unique innovation context; Settle in NZ* – 20% and 30% (respectively) of Fellows reported receiving less support than expected

International Fellows expressed a need for more, and ongoing, support to relocate, settle, and do business in New Zealand – many are finding the

business context very different to what they are used to. Fellows are finding the New Zealand business culture to be highly relationship-based, requiring trust to be built over time.

*... And more workshops. Not webinars by BNZ on how to get settled in NZ, but a 2–3 day workshop with multiple partners on how to grow a successful business in NZ. [Fellow]*

*More support around living here and basing ventures. Most events seem focused on the wider non-NZ community and those of us who moved our lives and ventures here need more support to make that successful and worthwhile so that we can be a use case and attract the others. It will create a multiplier effect, but that needs to be designed. [Fellow]*

*Would be nice to have more support for venture development in NZ. NZ offices overseas as well as in NZ could be more connected to EHF to offer this support. [Fellow]*

Specific settlement support needs to include information on relocating families, and the basics of living here – housing insurance, residency requirements and the like. The small number of Fellows who have settled here to date indicates that this should be a priority.

Finally, a small number of Fellows expressed the need for greater clarity about the criteria and the process for determining Permanent Residency. One evaluation participant indicated that International Fellows' dependence for Permanent Residency on EHF support was leading some Fellows to hold back critical feedback about, and to, the organisation. Insecurity about future residency status may also create a barrier to integration if it reduces Fellows' commitment to New Zealand.<sup>24</sup>

*It's very unclear what the criteria are for permanent residency. It would be nice if that was clarified. For example, if we just put NZ\$1M in qualified*

<sup>24</sup> We understand that since the survey and interviews were carried out, EHF has communicated further with Fellows and commenced a process for Cohort 1 Fellows to seek EHF support for their Permanent Residency applications.





*investments are we good? Does it have to be 2 years in advance or can it be shorter? As an [profession] it's mentally taxing to try to navigate systems while also building things. [Fellow]*

## More applied, or different supports

Fellows that are less positive about support they have received from EHF to connect beyond the Fellowship recognise the limited person-resources of the EHF team, and are keen for more systematic approaches to providing this support, although they don't necessarily require it to be delivered by EHF.

*I think I had expected a more coherent connection mechanism - something structured and facilitated. [Fellow]*

*More planned networking and introductions to other networks. [Fellow]*

*With a small staff, EHF is not the right place to ask routine questions about business registration, or mundane living matters. [Fellow]*

A few Fellows point to limitations of the current support model being heavily reliant on networking events.

*However, beyond [Welcome week and New Frontiers] there is a WhatsApp group, which is somewhat useful, but dominated by a couple of very loud voices. There are some events, but it feels like these are attended by an inner circle and others have to work quite hard to be invited? [Fellow]*

*Monthly EHF gatherings are useful to connect with others, but rarely have they ended with anything more than networking. Same likely applies to New Frontiers or Hui. [Fellow]*

*Welcome week and NF were fantastic, then you find yourself on your own. There is a definite gap afterwards. I'm proactive, have showed up in EHF offices a couple of times. They are happy to chat and give advice. But I've had to initiate those discussions, the question is when you don't know what you don't know, you don't know what to ask. [Fellow]*

The cost of attending events was also identified as a barrier by some.

*...Creating physical meetings is good but they privilege those with resources and do not provide any opportunity for others to participate and connect. [Fellow]*

## Access to additional funding sources

A number of Fellows expressed a need to know how to access funding or other types of financial supports.

*More financial support would be great. [Fellow]*

*Significant support and/or sponsorship to settle in Aotearoa New Zealand in order to increment the time to scale our operations in the country. [Fellow]*

*It would be awesome if the EHF provided more of that, eg partnerships with IT companies offering those services to fellows for free for a few months, or at discounted rates. [Fellow]*

*Financial support with flights/accommodation to attend EHF events for International Fellows. [Fellow]*

*Financial investment would be great. If the EHF were provided grants from the NZ government that would tie together the vetting process of the project and NZ govt involvement. [Fellow]*

*Funding and capital raising. [Fellow]*

*Access to funding, and help with grants etc.. I see lots of entrepreneurs with great ideas, wanting to do more, but having first to figure out how to fund it all over here. In Germany, you can apply for scholarships (eg EXIST scholarship), which pay for 1-3 staff members for a year, and require fairly little administrative work (but you can only apply once...). Something like this would help kickstart a few fellows very much. [Fellow]*

At the same time, some ecosystem stakeholders voice concern that the GIV may increase competition for the small amount of start-up capital that is





available in New Zealand, if Fellows are fund raising from New Zealand sources.

*I think NZ is starved of capital supporting new start up ideas. What I hope is that we don't bring all these fellows to NZ, who come in with bravado of Americans and attract the funding that would have otherwise gone to local star- ups and entrepreneurs. There is obviously a limited pool of capital.  
[Ecosystem stakeholder]*



# IMPLEMENTATION: THE PUBLIC-PRIVATE PARTNERSHIP

## The partnership between EHF and INZ

The relationship between EHF and INZ has become more transactional and strained as the pilot has progressed. The shift is driven by several factors:

- mismatched expectations about the certainty of additional funding during the life of the pilot, especially as contracted government funding has been depleted
- limited contractual levers for INZ to actively manage delivery by EHF
- a shift in priority and focus for INZ – less emphasis on immigration as an economic lever and more emphasis on INZ’s role as a regulator.

## Funding and sustainability

Funding for the pilot and revenue sources are reported in the Introduction to this report. The insecurity of funding has been a major challenge to EHF delivery of the pilot. Over the last year it has diverted resources away from delivery and towards fundraising. This has resulted in significant increases to fees for Fellows, creating new tiers of sponsorship for ecosystem stakeholders that can be a barrier to connection. It has also contributed to a more formal, and at times ‘strained’, relationship between the core partners (EHF and INZ).

EHF is generally thought to be delivering a lot with a small team and limited resources.

*It is a very frugal network. The events in Trentham are not extravagant. [EHF] haven’t taken that \$4m and wasted it. They have very high net worth individuals out there camping. [Ecosystem stakeholder]*

*The guys at EHF have worked extremely hard to make this work. They have given hearts and souls, long hours on the smell of an oily rag. [MBIE/INZ]*

Both parties agree that the true costs of the pilot were not known at the outset, and the contracted figure, \$4m over four years, was not intended to meet the full cost. EHF estimates the operational costs for the current level of delivery to be around \$2m per year – double that which is funded through the government contract.

By early 2019 it became clear that EHF could not sustain its current level of activity funded by the existing contract, supplemented by then-levels of fundraising. Partners described discussions and negotiations related to this period as follows:

- EHF report that they had been honest and open with INZ about the sustainability of income; their expectations were raised that additional funding would be made available by INZ to support the pilot; and that they were notified late in the process that no additional funding was available
- INZ report that EHF had been unresponsive to their regular warnings that the level of spending could not be sustained; the contract lacked levers to enable INZ to do more than ‘warn’ and ‘advise’ EHF; EHF took as a given that INZ would find more funding for the pilot, which they tried, unsuccessfully, to source from other government agencies.

Both parties agree that the contract was developed with an expectation that the pilot would be supported by additional funds sourced from outside of the INZ contract. However, stakeholders from within and outside the partnership



have differing understandings about where that funding was intended to come from:

- some stakeholders think it means funding for the pilot will increasingly come from sources outside of government (ie private sector). They note risks of real and perceived conflicts of interest if either corporate New Zealand and/or visa-seeking International Fellows are too close to INZ visa processes
- other stakeholders think it means that funding will increasingly come from outside the existing contract with INZ (but from within the wider government envelope).

*It is not a bad idea to get third-party funding but the main thing is managing real and perceived conflicts of interest. For example, charges / asking Fellows to assist with funding needs to be carefully managed given EHF make the recommendation regarding Permanent Residency. [MBIE/INZ]*

EHF experience of trying to raise funds from the private sector has met with limited success:

- New Zealand private sector sponsorship is limited in general and not well aligned to opportunities like the Fellowship
- private sector funders can have competing objectives and intentions.

Several stakeholders and some Fellows voiced serious concerns about the ongoing sustainability of the pilot, and the lost opportunity, and potential risks to New Zealand's reputation, if the pilot ceases prematurely or if it is not funded to deliver on its promises to support existing Fellows to integrate.

*I think EHF knows what is needed to provide more support to help the fellows succeed, but I feel the constraints on funding and the uncertainty*

<sup>25</sup> Which include, "You must remain on the Edmund Hillary Fellowship for 30 months before applying for permanent residence. To be eligible for residence, you must maintain the support of the Edmund Hillary Fellowship." INZ website, accessed 11/12/2019

*placed on the future of EHF limit what they can plan on providing. I think it would be in the New Zealand government interest to help the fellows succeed and give returns on the investments New Zealand has already made. [Fellow]*

*We attracted all these fellows into New Zealand, it is [government's] collective risk. [Ecosystem stakeholder]*

Interviewees across all groups (Fellows, partners and ecosystem) expressed concerns about the ongoing impact of funding insecurity as the pilot enters its final year. In the immediate future, uncertainty will impact the commitments that EHF can make about ongoing support for Fellows, which in turn is likely to impact EHF attraction and selection for the final cohorts (Cohorts 7-8). In the medium-term there will be a need to continue to support existing Fellows beyond the life of the pilot and to enable them to meet the requirements for Permanent Residency, which include maintaining the support of EHF.<sup>25</sup>

## Relevance of the pilot to INZ's focus

*Over the last couple of years we have changed from partner to contract manager. That has been deliberate as INZ has moved from facilitator to regulator we have had to take that position strongly. As we have moved to regulator it is more appropriate that the contract is managed as far away from the visa system as possible. [MBIE/INZ]*

*Integration etc – that is not INZ business. They should just be running the visa class. [Ecosystem stakeholder]*

Stakeholders acknowledge the advantages of the pilot being initiated and managed by INZ. As designed, the pilot operationalises unprecedented processes that bring knowledge and experience of third parties, in this case



entrepreneurs, into immigration decisions. As such, it could only ever have been led by INZ in the early stages.

However, as the pilot progresses further into the integration phase, and in the context of INZ's shift in focus, there is an increasing sense that other parts of the government innovation ecosystem may be better placed to broker the connections required to support the pilot going forward.

*INZ is not tapped into the right networks to support EHF. [Ecosystem stakeholder]*

*But also regarding implementation and giving [the pilot] the best chance of succeeding, it needs to be managed more closely to the innovation ecosystem. INZ is a service delivery organisation. We have had a purple patch of innovation, but the reality is that I think we need to position [the pilot] closer to the innovation ecosystem. From a political point of view, NZ getting the innovation it wants and needs, Immigration is not the place for that. Callaghan has been the obvious choice. [MBIE/INZ]*

*I think we have underestimated the size and cost of this task [integration], and that this job is still ahead of us. To that end, we need government partners who are prepared to step into the task, not keep it at arm's length, and just treat it as a minimalist contractual undertaking. [Ecosystem stakeholder]*

## Partnerships with other actors in the government innovation ecosystem

Throughout the last year, key government agencies that are part of the innovation ecosystem have been discussing management of and support for the pilot. At one stage, responsibility for managing the programme (and EHF's contract) was almost transferred to another agency.

Stakeholders agree that other actors in the government innovation ecosystem could offer significant value by supporting the pilot, if their

contribution could be leveraged in a systematic way. In particular, the following agencies were mentioned by multiple stakeholders:

- Callaghan Innovation – many stakeholders view Callaghan as the obvious government-partner to lead activation of the Fellowship through the integration phase of the pilot
- New Zealand Trade and Enterprise
- regional Economic Development Agencies
- other parts of MBIE – Economic Development Policy Unit, Innovative Partnerships.

The widespread support for the pilot across ecosystem stakeholders is yet to result in substantive contributions in cash or kind resource that would help EHF deliver Fellow integration.

*I personally think it is quite valuable and a really innovative visa setting. When I go out internationally and talk to people, they think it is very unique and interesting, even if it is not for them personally because it shows we are a government that can do innovative things. [Ecosystem stakeholder]*

*From [agency] and personal perspective – this is one of the coolest things the government ever came up with, and it wasn't this government. If we get the cohort up to 400 or even a 1000, NZ would be seriously connected into a massive global network. As it is, there aren't many big players out there we can't get in to through the network. [Ecosystem stakeholder]*

There are some examples of ecosystem actors engaging with the pilot to systematically support Fellow integration, most notably the EDA for Christchurch – ChristchurchNZ, however these examples are limited.

In the integration section of this report (see page 46) we discuss some of the barriers inhibiting ecosystem actors from taking a more active role. These include, actors not knowing *how* to engage with the pilot, some report difficulty engaging with EHF (due to EHF being understaffed / mismatch of



styles), the cost of engaging (eg to attend events and as a catalyst sponsor) and EHF's limited presence in regions.

Some ecosystem stakeholders are calling for more coordinated leadership of the pilot across government agencies that can leverage the wider resources available to maximise Fellow integration and potential. It is increasingly clear that this is critical to the success of the pilot (ie it requires a NZ Inc approach with each party/agency playing its part).

*[We] need to uncouple the funding from the visa. So we can protect the visa. It is going to be hard under the current policy settings. We need to remove the risk that the funding becomes a reason to withdraw it.*

*[Ecosystem stakeholder]*

## Areas requiring focus or consideration

As the pilot moves further into the integration phase, it would be timely to revisit the potential and / or expected roles and contributions of relevant government agencies, and mechanisms for their engagement with the pilot. This is an exercise MBIE could lead, in collaboration with EHF and wider ecosystem stakeholders.

Greater clarity is also needed on how Fellows will be supported post-pilot, to integrate and to meet requirements for Permanent Residency – questions have been raised by Fellows, EHF and ecosystem stakeholders.



# EARLY OUTCOMES

This section provides a brief update on early programme outcomes – one year since outcomes data was last collected.

The focus of this year's report is integration – outcomes will be fully explored in next year's report.

Feedback on outcomes has been drawn from:

- survey responses from Fellows in Cohorts 1, 2, 3 and 4 (Cohort 5 was only welcomed in October 2019)
- respondents to the Ecosystem survey
- interviews with Fellows and representatives of the Ecosystem.

When assessing outcomes, it is important to remember the limited and differing amounts of time the cohorts have been in the Fellowship. At the time of data collection the cohorts have been in the Fellowship for approximately:

- Cohort 1 – 24 months
- Cohort 2 – 19 months
- Cohort 3 – 12 months
- Cohort 4 – 6 months.



## Contributions to outcome domains

The intervention logic identifies five domains where early outcomes are expected:

- create: creating new New Zealand based start-ups employing New Zealanders, creating new organisations and ventures
- support: investing in or working with existing and emerging New Zealand based businesses
- influence: organising events, attending workshops and seminars that involve the innovation eco-system
- connect: sharing international networks and supports with New Zealand businesses
- attract: attracting new local and international investment to New Zealand based businesses.

### Fellows report positive contributions across domains

Most Fellows (58 out of 75) report making a *high* or *very high* contribution in at least one early outcome domain.

- Cohort 4 Fellows report less progress than others, as would be expected given the shorter time they have had in the Fellowship. Of the 17 Fellows who rated their contribution as *low* or *very low* across all domains, eight were from Cohort 4.

Fellows assessed their contribution as *high* or *very high* at different rates across the domains:

- the outcomes Fellows most commonly reported contributing to (at a *high* or *very high* rate) were:
  - CREATE (33 out of 75 – 44%)
  - SUPPORT and CONNECT (31 out of 75 – 42%)

- INFLUENCE (28 out of 75 – 37%)

- the outcome Fellows least commonly reported contributing to (at a *high* or *very high* rate) was ATTRACT (18 out of 75 – 24%).

### Progress since last year – but drop in ‘attract’

Since last year, more Fellows are reporting *high* or *very high* contributions to the CREATE and SUPPORT domains; lowest progress has been reported in ATTRACT across both years.

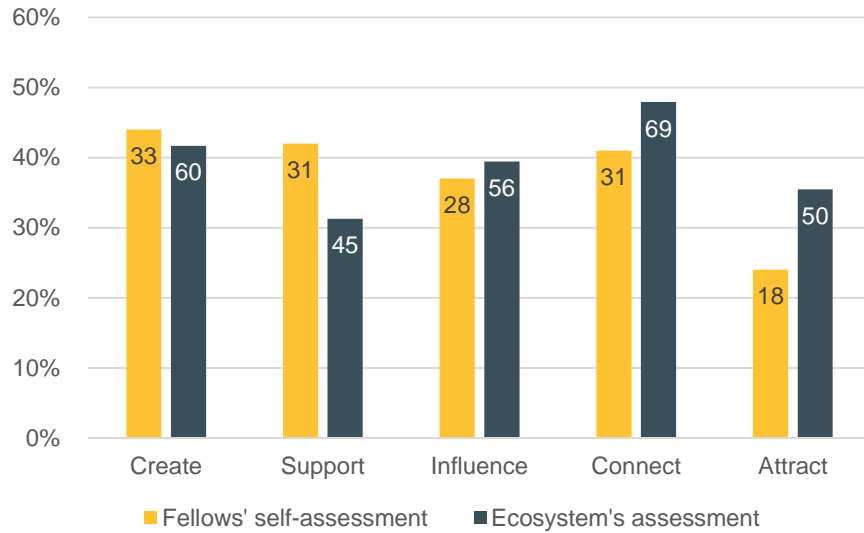
### Ecosystem also sees positive contributions being made

Figure 8 compares Fellow self-assessments to Ecosystem feedback. Respondents to the Ecosystem survey confirm that Fellows have been making contributions to all five domains, at roughly similar rates to that reported by Fellows. The key differences are in:

- the SUPPORT domain – the Ecosystem responses are *less* positive about the contribution of Fellows
- the ATTRACT domain – the Ecosystem responses are *more* positive about the contribution of Fellows in this domain.



**Figure 8: Proportion of Cohort 1-4 Fellows and Ecosystem respondents who assess Fellow contributions to date as high or very high, by domain**



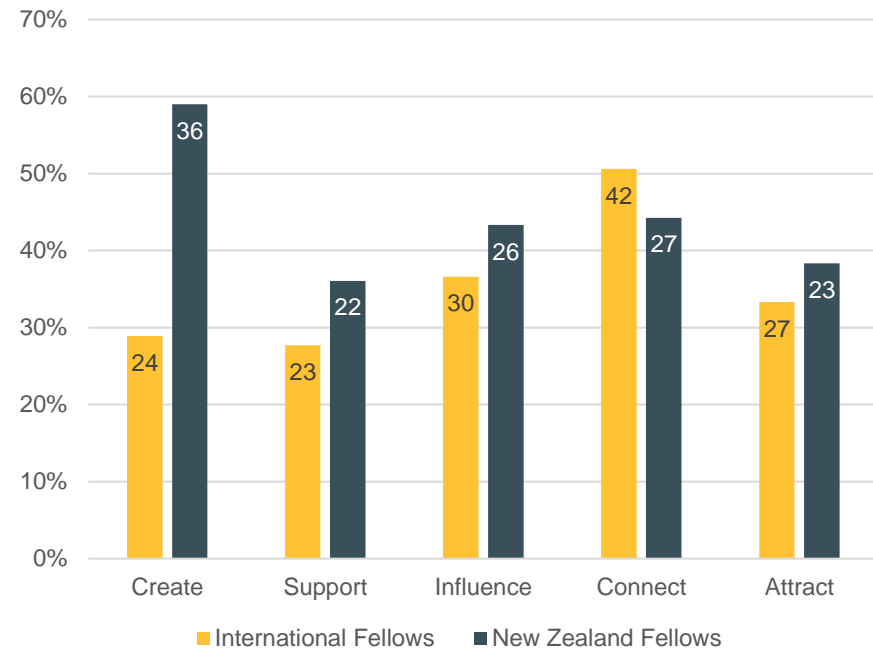
Source: Data set 4, MartinJenkins Fellows survey, n=75 Cohort 1-4; Ecosystem survey, n=83.

### New Zealand Fellows are more visible to the Ecosystem

Respondents to the Ecosystem survey also perceive differing rates of contribution by New Zealand and International Fellows (see Figure 9). Contributions by New Zealand Fellows are *more* visible to Ecosystem respondents across all but the CONNECT domain, with the difference being

especially large in the CREATE domain (NZ Fellows seen as making a higher contribution by 30 percentage points).

**Figure 9: Proportion of ecosystem representatives reporting high contributions towards outcomes to date by International Fellows v New Zealand Fellows**



Source: Data set 4, MartinJenkins Ecosystem survey, n=61 for NZ Fellows and n=83 for International Fellows.





## CREATE – what Fellows are doing

Domain of highest impact to date – according to both Fellows and Ecosystem.

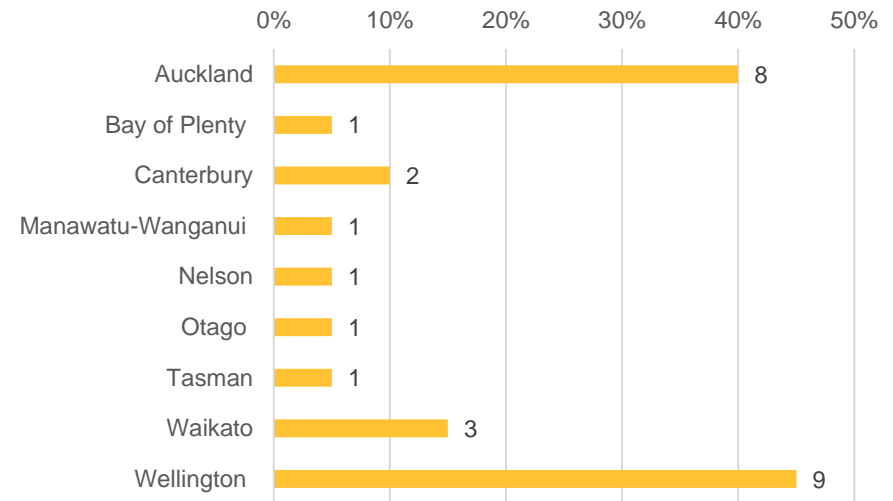
- Big increase in Fellows' self-assessment from last year (44% this year, up from 28% last year).
- Ecosystem is seeing a lot of creation by New Zealand Fellows (more than they are seeing from International Fellows).

### Jobs are being created

- Fellows told us they have created 114 new jobs since joining the Fellowship.
  - Over half of the reported jobs have been created by 10 New Zealand Fellows (out of 18), who are currently employing 68 New Zealand residents.
  - 10 International Fellows (out of 59) are currently employing 46 New Zealand residents.

The jobs that have been created to date, are predominantly located in Wellington (45%) and Auckland (40%).

Figure 10: Proportion of Cohort 1-4 Fellows who report they have employed New Zealand residents, by region



Source: Data set 4, MartinJenkins Fellows survey, n=20. Multiple options could be selected as a response.

In addition, some Fellows reported that they do not employ people but work on a project- or contract-basis.

*My business is an international venture working with people from all over the world... We regularly work with 5 [New Zealand] individuals [on project-basis contracts], and this is likely to grow. [Fellow]*

*One area not covered very much was our use of NZ contractors - such as a \$50k contract ... or using other NZ companies for legal, banking, or accounting services. We plan to do more of this, rather than make direct hires. [Fellow]*



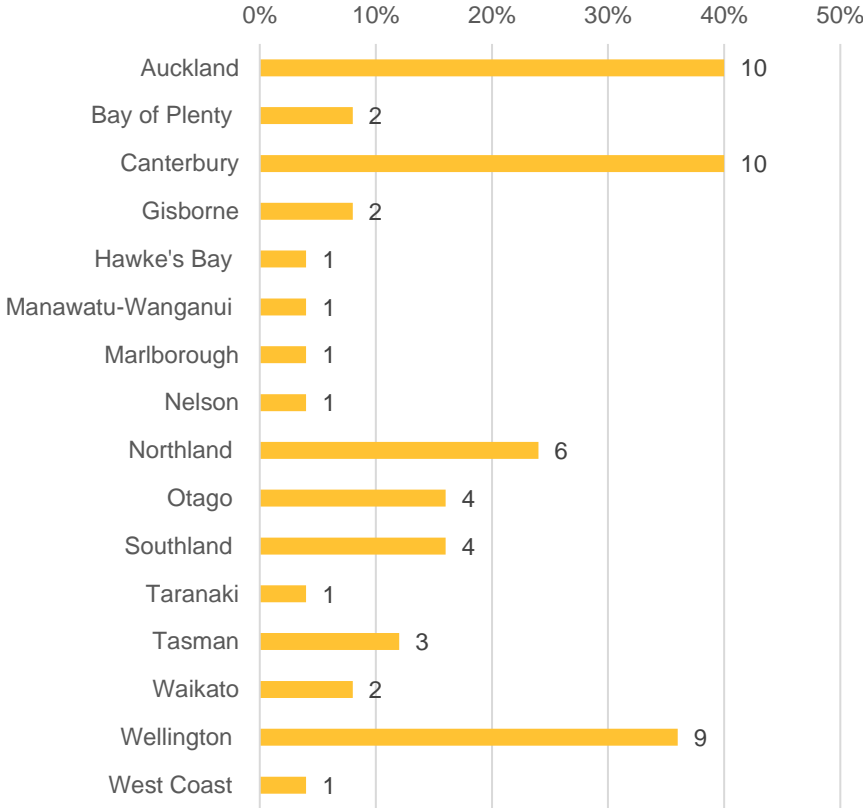
### Organisations are being created

25 Fellows told us they have created a new organisation in New Zealand since joining the Fellowship (eg companies, charitable trusts):

- 19 International Fellows (out of 59) have created an organisation
- 6 New Zealand Fellows (out of 18) have created an organisation.

The organisations that have been created are located across the country, with most in Auckland and Canterbury (40% in each region), and Wellington (36%).

**Figure 11: Proportion of Cohort 1-4 Fellows who report they have started organisations, by region**



Source: Data set 4, MartinJenkins Fellows survey, n=25. Multiple options could be selected as a response.

The organisations that have been created operate in multiple sectors of the economy, with the ICT sector being the most common. Other sectors identified included energy and the space industry, education, construction,



agriculture, food and beverages, financial services, investment, and business consulting.

## SUPPORT – what Fellows are doing

Domain of relatively high impact according to Fellows' self-assessment (42%).

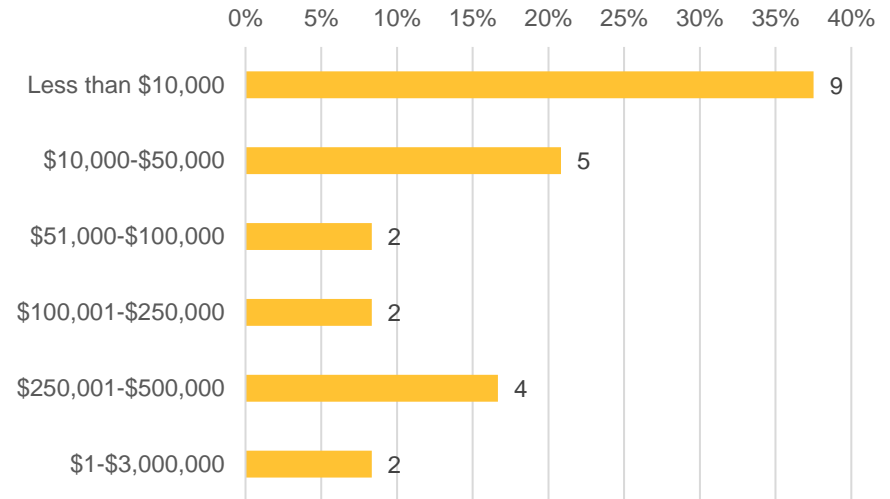
- Ecosystem feedback is not quite as positive (31% report seeing support from Fellows).

### Capital is being invested by Fellows

24 Fellows have invested capital in a New Zealand based organisation.

- Who they are investing in:
  - most investments have been made in the ventures of other Fellows.
- How much they are investing and where:
  - most investments (38%) were under NZD 10,000, and a further 21% of investments were between NZD 10,000-50,000; two Fellows have invested between NZD 1,000,000 and 3,000,000
  - organisations in Wellington received most investments (46%), followed by Auckland based organisations (29%).
- Who is investing:
  - 10 of the 24 Fellows who have invested capital are from Cohort 1.
  - 13 of the 24 Fellows who invested also helped *raise* capital (raising capital is discussed under ATTRACT, below).

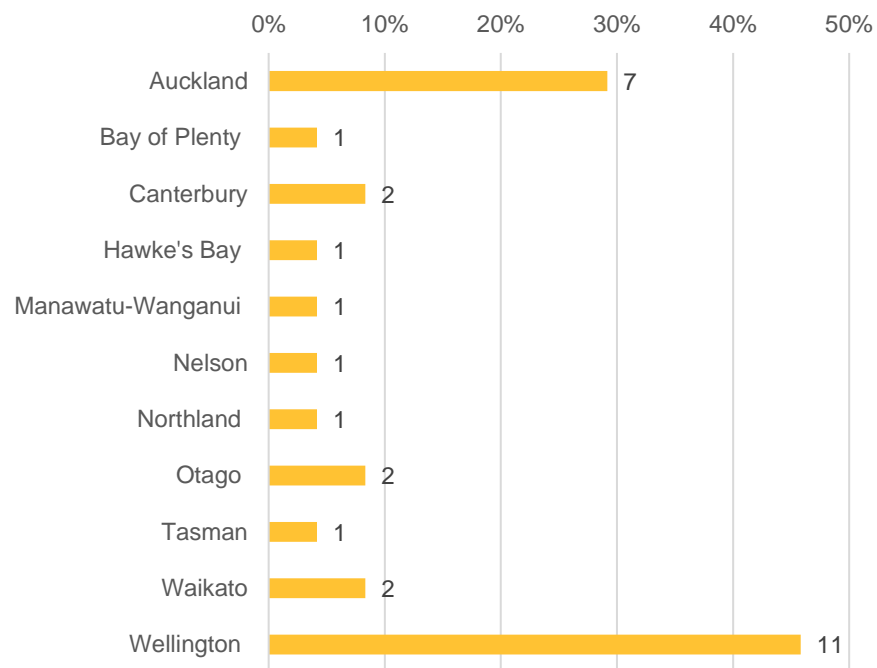
Figure 12: Proportion of Cohort 1-4 fellows who have invested capital in by amount invested (NZD)



Source: Data set 4, MartinJenkins Fellows survey, n=24.



**Figure 13: Proportion of Cohort 1-4 Fellows reporting to have invested in organisations in various regions**



Source: Data set 4, MartinJenkins Fellows survey, n=24. Multiple options could be selected as a response.

### Governance roles are held

- Since joining, 21 Fellows have held governance roles (eg Directorships) in New Zealand businesses or not-for-profits:
  - this includes 14 International Fellows and 8 New Zealand Fellows
  - one-third (7 Fellows) have held multiple governance roles (between two and five)

- Fellows also intend to hold additional governance roles in the future: 31 are *certain* or *fairly certain* they will do this in the next two years.

### Other examples of support

In survey responses Fellows also described providing various other types of support to existing and emerging New Zealand based businesses through formal and informal arrangements, one-off and sustained. Different types of support include:

- advice, consulting, mentoring, and coaching both for businesses, non-profit organisations and government
- delivering workshops and presentations to build capacity and disseminate perspectives
- practical and strategic support (eg accommodation, introductions) for New Zealand entrepreneurs overseas
- business collaboration with New Zealand companies (eg commissioning work, purchasing products, partnerships)
- providing advice on fundraising strategies.

Ecosystem survey respondents also provided examples of supports provided by Fellows, including investment, advice, coaching and mentoring.

*Two of my friends ... have made a number of investments in the New Zealand start-up ecosystem and have provided significant support to local entrepreneurs. [Ecosystem representative about International Fellows]*

*[I have seen] direct investment of USD 100,000 plus advisory and governance support serving on company board of directors. [Ecosystem representative about International Fellows]*

*The communities we serve have experienced first-hand the deep impact the EHF fellows have contributed to regional economic development and the collaborative innovative approach towards supporting environmental*



challenges through technologies. [Ecosystem representative about International Fellows]

They have been the driving force in setting up sector specific hubs for innovative start-ups in a domain where NZ has historically been absent (and never imagined it could be a player). They are generous with their time, contributing to the ecosystem with their knowledge and experiences. [Ecosystem representative about International Fellows]

Helped create and run [event] ... Several start-up companies resulted, along with a hardware solution ... [Fellow]

Some Fellows engage with specific businesses and industries on particular (technical) topics, while others raise more broad societal issues.

I've had closed door sessions with the entire ecosystem of [name of a large New Zealand based company]. [Fellow]

I've shared a unique strategy for the use of stock and stock options, consulting with 5 different NZ companies on this topic. [Fellow]

## INFLUENCE – what Fellows are doing

Domain of relatively high impact according to Fellows' self-assessment (37%).

- Ecosystem feedback is similar (39% report seeing the influence of Fellows).

Most Fellows who reported outcomes in the Influence domain described organising and speaking at events, conferences, and other types of meet-ups, including EHF-organised events (eg New Frontiers). Fellows seek to influence not only businesses and the innovation ecosystem, but also local and central government, and wider society.

Participated in roughly 50 speaking events across New Zealand on the opportunities in space and innovation ecosystems. Mentored and advised roughly 10 start-up companies. [Fellow]

We have spoken at several events including the national education conference, radio interviews and the new frontiers event. [Fellow]

I have presented to [a city council] to encourage them to think Regeneratively as they confront the climate change emergency. [Fellow]

Given over a dozen talks in schools and colleges. [Fellow]

I spoke about design, innovation and women's inclusion to [organisation]. I spoke about digital financial inclusion at the [event]. [Fellow]

Ecosystem survey respondents also provided specific examples of Fellows' influence.

Role modelling how to be in good relationship with tangata whenua, doing things the tika (right) way with integrity and good intent. Innovating and evolving how we bring the principles and values of the treaty of Waitangi into our modern day practice, and how business is conducted. [Ecosystem representative about New Zealand Fellows]

EHF fellows have had significant access to Ministers and have been able to help encourage wider level thinking on complex topics like crypto currency etc. These are world leading innovators in these sectors that our business leaders and politicians arguably wouldn't have had access to otherwise. [Ecosystem representative about International Fellows]



## CONNECT – what Fellows are doing

Domain of relatively high impact according to Fellows' self-assessment (41%).

- This year more Fellows rated their contribution to CONNECT as *low* or *very low* (25% compared to 14% last year).
- Ecosystem feedback is positive (48% report seeing Fellows make connections).
  - This is the only domain where the ecosystem sees International Fellows making a stronger contribution (51%) than New Zealand Fellows (44%).

Fellows' connections are discussed in an earlier section of the report (Integration: Connection and Inclusion).

Fellows leverage their networks to connect with New Zealand based organisations with investors and entrepreneurs overseas, and also to forward their own business/ innovation goals.

Examples of connection given in Fellows' survey responses include:

- with other Fellows, both within and across EHF Fellowship Cohorts
- within the business and local communities where International Fellows have chosen to reside
- within specific industries/sectors inside New Zealand and globally
- across local and central government in New Zealand
- connecting New Zealand entrepreneurs and businesses with international investors, businesses and networks, often in a targeted and deliberate way
- connecting Māori organisations with other indigenous peoples for business, exchange and learning opportunities.

*When I meet people at New Frontiers, I try to connect them to people that I think might be able to help. Sometimes they are other Fellows and sometimes they are folks from outside the industry. [Fellow]*

*I have set-up the first EHF fellow led co-vacation, a four day event that brings EHF fellows together, meeting local social entrepreneurs and collaborating on supporting each other's projects. [Fellow]*

*We have been in talks with people from [iwi] ... and we talked with people from the government from the Ministry of Education, from the MBIE, Immigration New Zealand, Gore to explore different projects. ... finally we approached people from Otago University and Otago Polytechnic in order to establish relations ... [Fellow]*

*I am working to facilitate learning between North American Indigenous natural builders and Maori. [Fellow]*

*Between Maori leaders and First Nations leaders in the Yukon through a cultural exchange in the Yukon. [Fellow]*

Fellows' efforts in connecting New Zealand and international businesses and investors are also recognised by the ecosystem stakeholders.

*The most significant contribution I would say is the network the fellows have and connecting that network with NZ. [Ecosystem representative about International Fellows]*

*Connecting NZ teams and other innovators with work and connections for more investment. This is the most grounded and practical result I have seen... [Ecosystem representative about International Fellows]*

*Connecting New Zealand's innovator's ecosystem with Silicon Valley. [Ecosystem representative about International Fellows]*

*... the social capital is in the process of leveraging into financial capital. For many of my NZ citizen friends, EHF has been a game changer in their access to global networks with the power to move resources. International partnership conversations are becoming more common. [Ecosystem representative about International Fellows]*



## ATTRACT – what Fellows are doing

Domain of lowest impact according to Fellows' self-assessment (this year 24%, last year 28%).

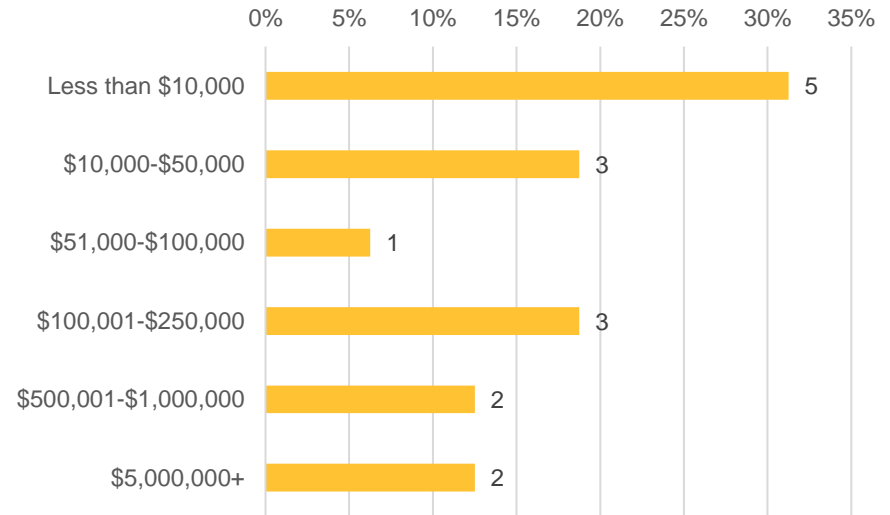
- Ecosystem feedback is more positive (35% report seeing Fellows attract capital).

### Capital is being raised

16 Fellows have assisted a New Zealand based organisation to raise capital.

- Most of these were International Fellows (11).
- Most investments have been made in the ventures of other Fellows. The amount of raised capital varies:
  - half of the Fellows who have raised capital (8) have raised less than NZD 50,000
  - two Fellows have raised in excess of NZD 5,000,000 – one of these is a New Zealand Fellow.
- Most capital was raised for organisations in Auckland (67%) followed by Wellington (33%).

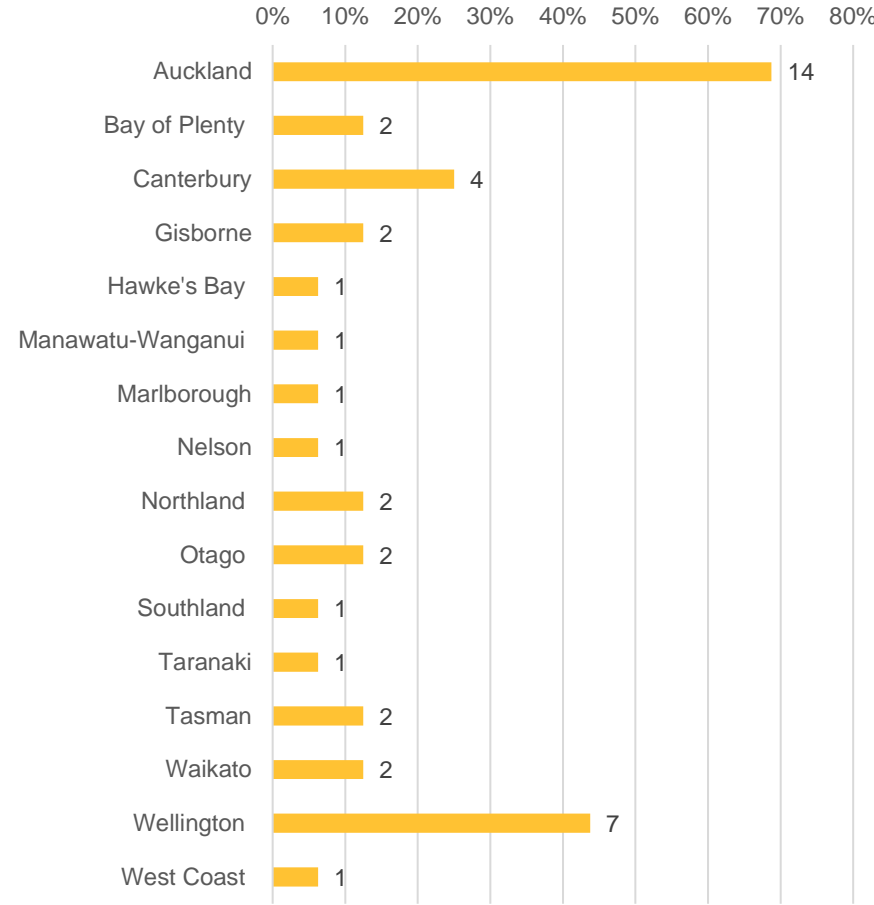
**Figure 14: Proportion of Cohort 1-4 Fellows who raised capital to be invested in New Zealand-based organisations, by amount invested**



Source: Data set 4, MartinJenkins Fellows survey, n=16.



**Figure 15: Proportion of Cohort 1-4 Fellows reporting to have helped raise capital in various regions**



Source: Data set 4, MartinJenkins Fellows survey, n=16. Multiple options could be selected as a response.

Ecosystem survey respondents also provided examples of Fellows attracting capital.

*[NZ Fellow] raised \$1 million of non-equity offshore funding to NZ and has set a leading example of [sustainability]. [Ecosystem representative about a New Zealand fellow]*

*Raising moderate capital ~\$2m NZD. [Ecosystem representative about a New Zealand fellow]*

*The local investor fellows have taken responsibility for organising a group of investor fellows to review NZ deal flow with a view to making EHF led investment in NZ start-ups. [Ecosystem representative about New Zealand fellows]*

*The most significant contribution I have seen to date is the bringing of significant impact investment capital to New Zealand. This has the potential to build NZ as a global hub of positive impact-based ventures. [Ecosystem representative about International Fellows]*

**International interest is being attracted**

Many Fellows have successfully attracted new International Fellows and have advocated for New Zealand abroad.

*I have attracted several high-profile entrepreneurs and investors to consider moving to New Zealand or develop long term investment plans for New Zealand ventures. This includes a major female entrepreneur, who has moved partially here, and a leading entrepreneur and angel investor, who is applying to EHF as well as making plans to invest here long term. [Fellow]*

*I've been working to promote EHF and New Zealand amongst developers, investors, and entrepreneurs around the world. Several of the people referred to EHF have become fellows. [Fellows]*

Some Fellows have worked to attract international companies to do business in New Zealand and with New Zealand businesses.





*I have encouraged a number of US and European based companies to test in NZ. This is because of the favourable regulatory environment ... [Fellow]*

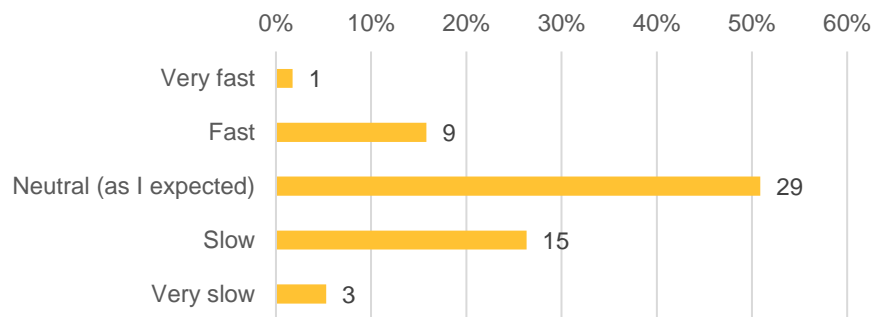
*I am very happy that I managed to get [CEO of a major high-tech company] excited about doing business in NZ... she will be coming in October and she and I are thinking of starting some collaborations together. [Fellow]*

## Progress in implementing ventures

### Fellows report good progress overall

Most Fellows are making good progress on their ventures, progressing at the expected rate, or faster. However, 21 out of 57 (31%) indicated that their progress was slow or very slow compared to their expectations.

**Figure 16: Fellows' perception of their progress to date compared to their expectations (Cohorts 1-4, %)**



Source: Data set 4, MartinJenkins Fellows survey, n=57.

## What has helped Fellows' progress?

Survey responses about what has supported fast progress included: absence of bureaucracy, openness and culture of innovation, community-based culture, and the ease of finding partners and collaborators.

The majority of Fellows also reported being a part of the Fellowship having made a positive impact on their ventures. Fellows attribute a range of positives to the Fellowship: 83% say progress has been faster; 74% say quality has been higher; 73% say scale has been bigger and 72% say progress has been more sustainable.

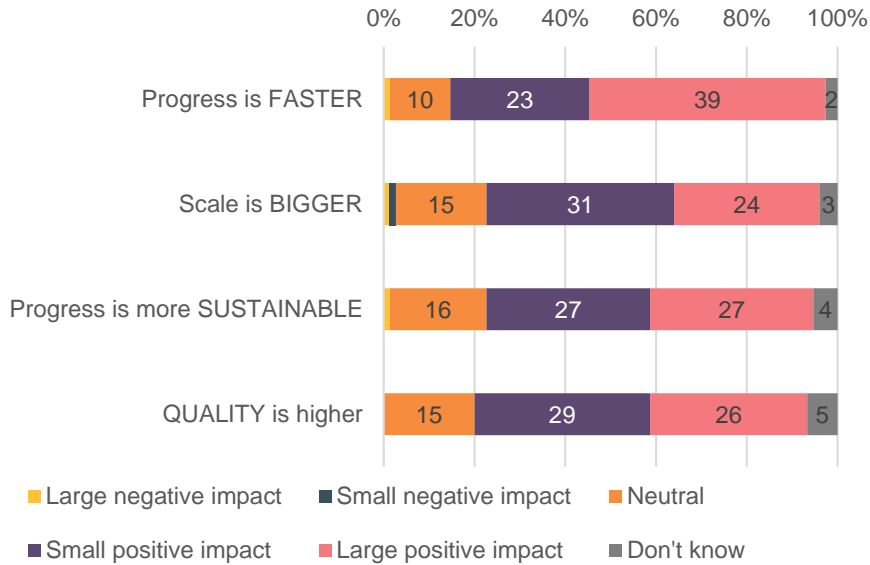
Respondents to the survey provide some insights to why the EHF Fellowship helped the progress of Fellows' ventures.

*EHF's has a broad reach and the ethos of the community is to help one another. [Fellow]*

*EHF team support - Prestige of the program (many people know EHF fellows and respond quickly) - Network of local fellows - International Fellows sharing experiences. [Fellow]*



**Figure 17: Proportion of Cohort 1-4 Fellows by how they rate impact of the EHF fellowship on them achieving their own business/innovation goals (Cohorts 1-4, %)**



Source: Data set 4, MartinJenkins Fellows survey, n=75.

## What has hindered Fellow progress?

Fellows identified a range of factors that affect their progress:

- different business culture or lack of understanding

*The business culture appears progressive but is in fact extremely conservative. We have encountered racism and misogyny, as well as aggressive winner-takes-all business tactics that we did not expect ... the status quo business culture is much less welcoming than the*

*Māori and other communities have been to us, our work and ideas. [Fellow]*

*Needed time to understand how business in New Zealand works. The pace is different and also norms of communication is still something I am getting used to. I thought I had come close to signing on to something then it was launched without me. [Fellow]*

*[...] also the NZ side of things has been slower than I'm used to (just from a communication / mgmt / operations side) ...things take weeks when they could take days. [Fellow]*

- the necessity to establish trust, which is especially difficult for Fellows who are not New Zealand based

*New Zealand (particularly in the regions) is very tightly networked with trust coming from familiarity.... Since we come from outside the network, we are by definition not trusted, so we are likely a lower priority. In addition, as we are on a visa, folks see our presence here as temporary. [Fellow]*

*I think some New Zealanders are suspicious of programs they view as coming from "outside", or programs being created without their input. I don't doubt that this attitude is, based on past experiences with other programs or organizations, somewhat justified. [Fellow]*

- personal reasons

*The fault is mainly our own -- we need our personal and professional circumstances to align more fully in order to manifest the opportunities we have in NZ. [Fellow]*

*because I was busy completing the Visa process for me and the family in addition to working on sustaining the current business back home for the coming 2 years so I can focus of establishing the new venture in New Zealand in the coming 2 years. [Fellow]*



- regulatory difficulties
 

*One of the other barriers has been the requirement to have resided in NZ for 6 months, before being able to incorporate locally; necessitating a greater level of readiness (ie spending 6 months away from the primary operation) than I had anticipated. [Fellow]*
- the necessity to change business plans once in New Zealand and better understanding the local business environment.
 

*The complex regulatory environment of the [industry] sector means that many business models and ideas that make sense on paper, can't be executed because of rules that block a particular approach. So we have had to run through multiple ideas to find a commercially sensible approach. [Fellow]*

## Direction of travel

There are many ways that early outcomes *could* translate to longer term impact for New Zealand, and for the world (as illustrated in the Intervention Logic).

This section briefly explores Fellows' expectations for future outcomes.

## Fellows expect to continue to increase impact

Across all domains, the proportion of Fellows expecting their outcomes to be *high* or *very high* increases when looking to the future (Figure 18).

- Feedback is similar to last years' – with strong future contributions expected for CREATE, SUPPORT, INFLUENCE and CONNECT.
- Fellows have less positive expectations for the ATTRACT domain – this is also the domain where Fellows feel they have currently made the least progress.

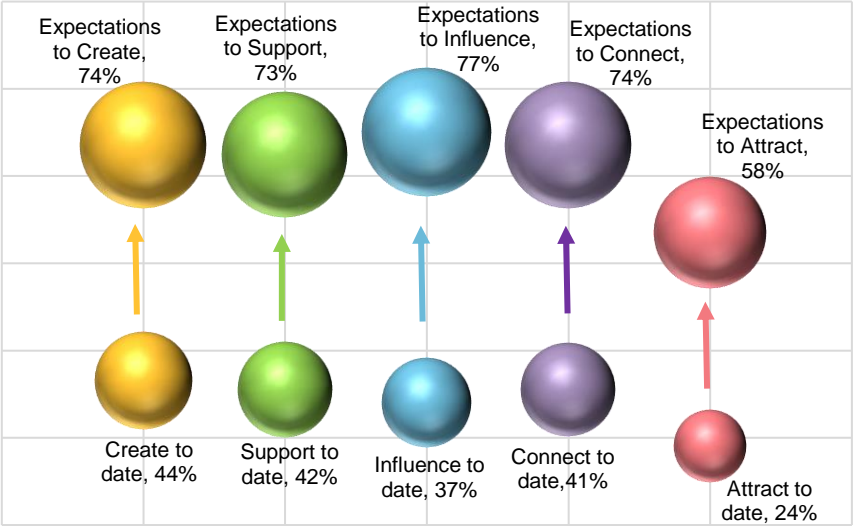
- Fellows were more positive about future outcomes in the ATTRACT domain last year, with 70% expecting to make progress (compared to only 58% this year).

## Ecosystem expectations are also positive

- Ecosystem expectations are similar – they expect Fellows to make strong contributions across all domains in future.
  - The Ecosystem is more positive about Fellows' future impact on ATTRACT – 72% are expecting to see progress in this domain.
  - The Ecosystem also has differing expectations for different types of Fellows:
    - for International Fellows – higher expectations that they will SUPPORT, INFLUENCE and CONNECT
    - for New Zealand Fellows – higher expectations that they will CREATE and ATTRACT.

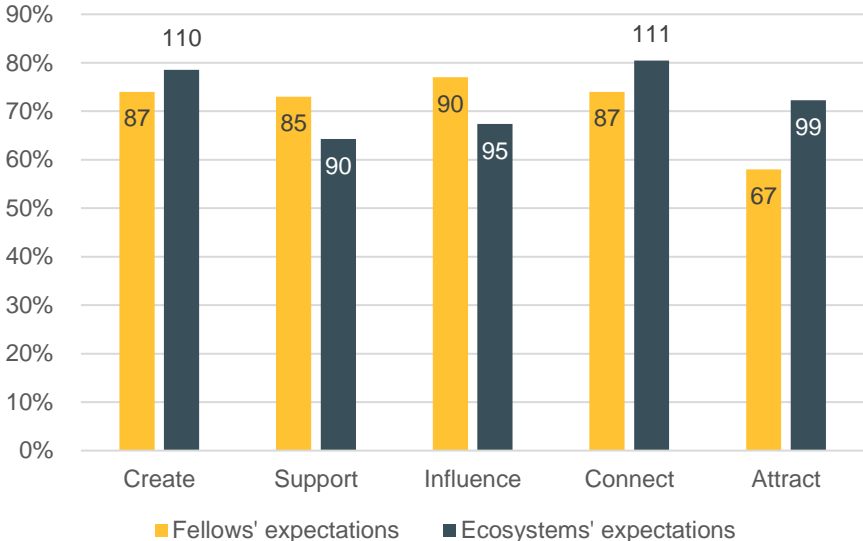


**Figure 18: Fellows expecting to achieve high or very high future contributions towards outcomes by domain, compared to contributions reported to date**



Source: Data set 4, MartinJenkins Fellows survey. Actual outcomes for Cohort 1-4 Fellows, n=75; Expected outcomes for Cohort 1-5 Fellows, n=117.

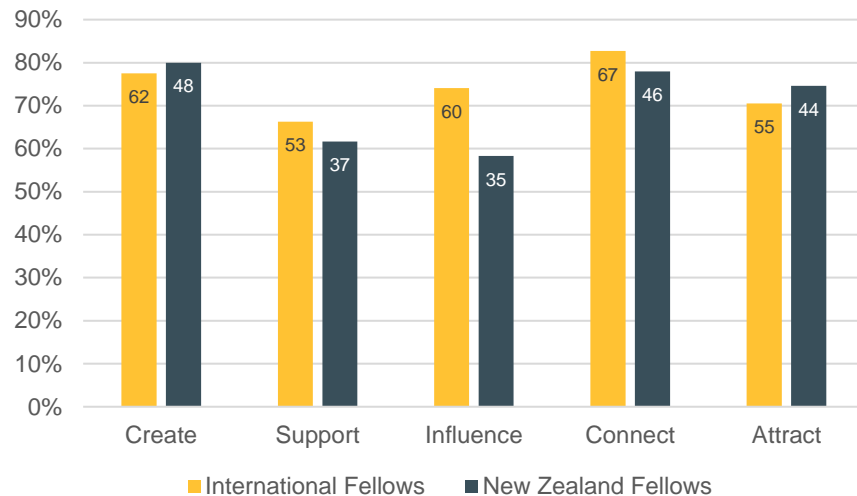
**Figure 19: Proportion of Cohort 1-6 Fellows with an expectation of high or very high future contributions compared to ecosystem's expectations**



Source: Data set 4, MartinJenkins Fellows survey, n=117; Ecosystem survey, n=83.



**Figure 20: Ecosystem's expectations of high contributions by International Fellows and NZ Fellows**



Source: Data set 4, MartinJenkins Ecosystem survey, n=81 for International Fellows and n=60 for NZ Fellows.

## Fellows plan for tangible impacts over the next 2 years

The survey asked Fellows what they were planning to achieve in the next two years, for key domains. The majority of Fellows are planning to tangibly create, support and connect within the next two years.

### Create

- Fellows intend to create more jobs: 26 Fellows said they are *certain* or *fairly certain* of creating 291 new jobs in the next two years.
  - A further 24 Fellows reported plans to create jobs but were not certain they would come to fruition.

- Fellows intend to create more organisations soon: 31 Fellows said they are *certain* or *fairly certain* of creating a new organisation in the next two years.
  - A further 17 Fellows reported plans to create new organisations but were not certain they would come to fruition.

### Support

- Fellows intend to invest more in the future: 29 out of 75 Fellows said they are *certain* or *fairly certain* they will invest in the next two years.
  - Over half (18) intend to invest NZD 100,000 or less; the remaining 11 intend to invest more than this but less than NZD 1,000,000.

### Connect

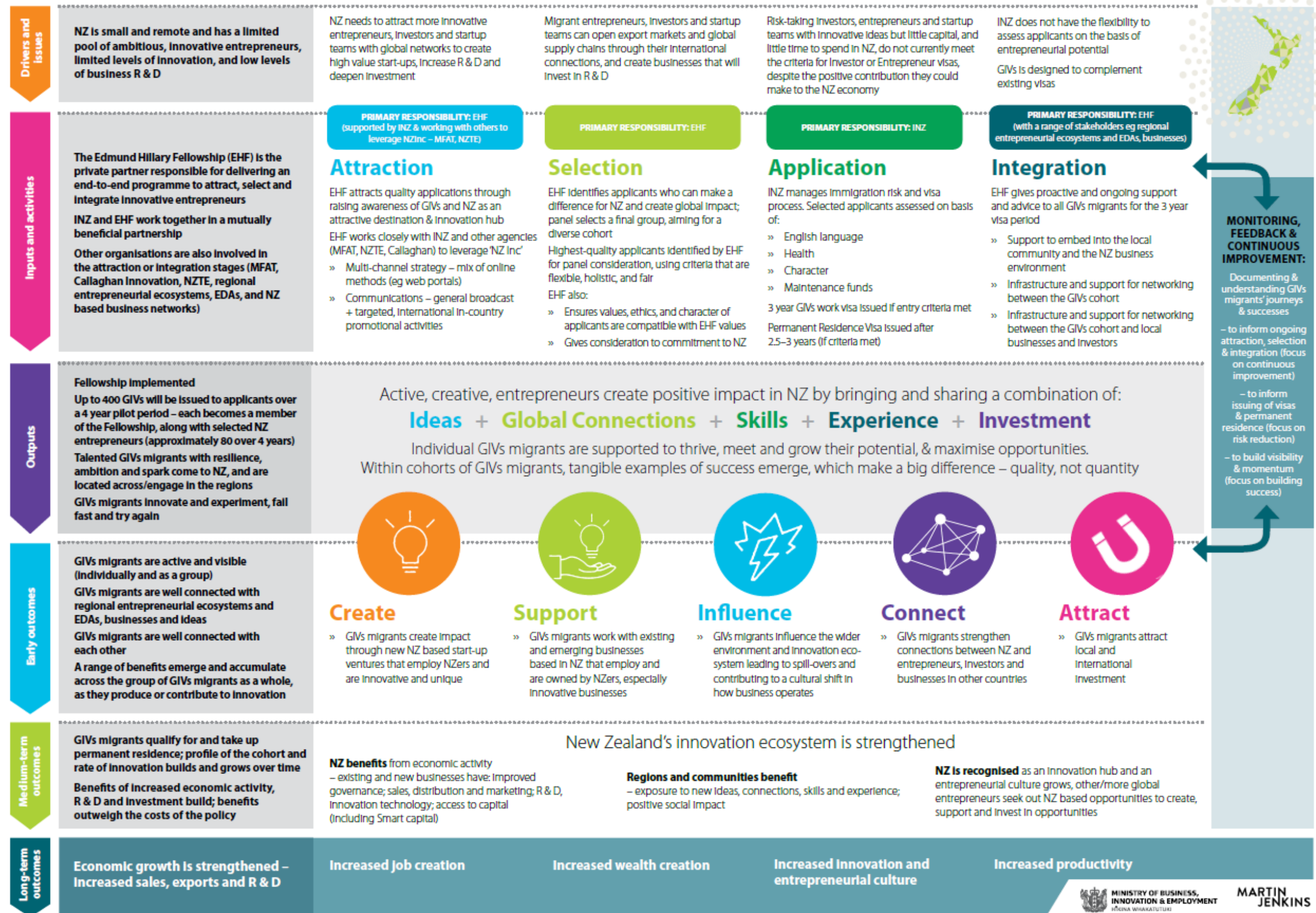
- Fellows intend to raise capital in the future: 15 Fellows are *certain* or *fairly certain* they will raise capital in the next two years.
  - A further 23 reported plans to raise capital but were not certain this would happen.







# APPENDIX 1: INTERVENTION LOGIC







# APPENDIX 2: ATTRACTION AND SELECTION

## Primary citizenship

**Note:** This section draws on the ‘uncleaned’ version of the data set provided by EHF on Fellow and applicant demographics. It contains a larger number of Fellows than other data sets – due to teams and individuals not being consistently counted, and some deferrals and some who didn’t go on to submit applications being counted.

The tables below give further insight into the diversity of applicants’ primary citizenship compared to Fellows. New Zealanders and North Americans are overrepresented:

- people with primary citizenship of New Zealand make up 11% of applications and 24% of Fellows; this is to be expected as it is core to the design of the Fellowship
- while 26% of applications come from people with primary citizenship of North America (Canada and the USA), they make up 42% of all Fellows, and 55% of International Fellows.

Applicants from Eastern Europe and Southern Asia (including India) seem to be least successful with their applications:

- Eastern Europeans make up 4% of applicants (74/1843), and none have been selected for any cohorts
- South Asians make up 16% of all applicants (297/1843), but only 2% of selected Fellows (5 individuals spread across cohorts); applicants from Southern Asia made 23% of all applications for Cohort 6 (81 applications - the same number as applications from North America), yet only 1 South Asian Fellow was selected. By comparison, 8 Northern Americans were selected.

For most other nationalities, the proportions of other applications and Fellows have remained within the same range ( $\pm$  a few percentage points).

Diversity of Fellows based on their primary citizenship fluctuates across cohorts. The diversity of Fellows increased in Cohorts 3 and 6: these Cohorts have the largest number of nationalities. Cohorts 2 and 3 have slightly smaller proportion of Northern Americans. However, the share of Northern American Fellows increased significantly again in Cohort 5.

**Table 11: Primary citizenship – all compliant applications**

	C1	C2	C3	C4	C5	C6
North America	83	40	103	68	107	81
Central & South America	16	6	15	9	9	10
Africa	8	14	29	15	22	29
Middle East	13	13	18	20	9	20
UK & Ireland	19	10	34	11	23	26
Western Mainland Europe	32	12	12	14	25	28
Eastern Europe	5	7	36	8	4	14
New Zealand	2	1	4	4	9	0
Australia & Pacific	21	9	12	18	24	23
East & Central Asia (includes China)	38	14	30	18	22	22
South East Asia	36	17	75	42	46	81
Southern Asia (includes India)	83	40	103	68	107	81

Source: Data set 2, EHF supplied data



**Table 12: Primary citizenship – all Fellows**

	C1	C2	C3	C4	C5	C6
North America	17	11	15	13	23	8
Central & South America	0	1	1	0	3	1
Africa	0	2	1	0	1	1
Middle East	0	2	2	5	0	1
UK & Ireland	2	1	6	1	2	2
Western Mainland Europe	0	2	3	2	1	3
Eastern Europe	0	0	0	0	0	0
Australia & Pacific	1	3	1	0	2	1
East & Central Asia (includes China)	2	3	0	0	1	1
South East Asia	0	0	1	3	0	1
Southern Asia (includes India)	17	11	15	13	23	8

Source: Data set 2, EHF supplied data

## Industry groupings

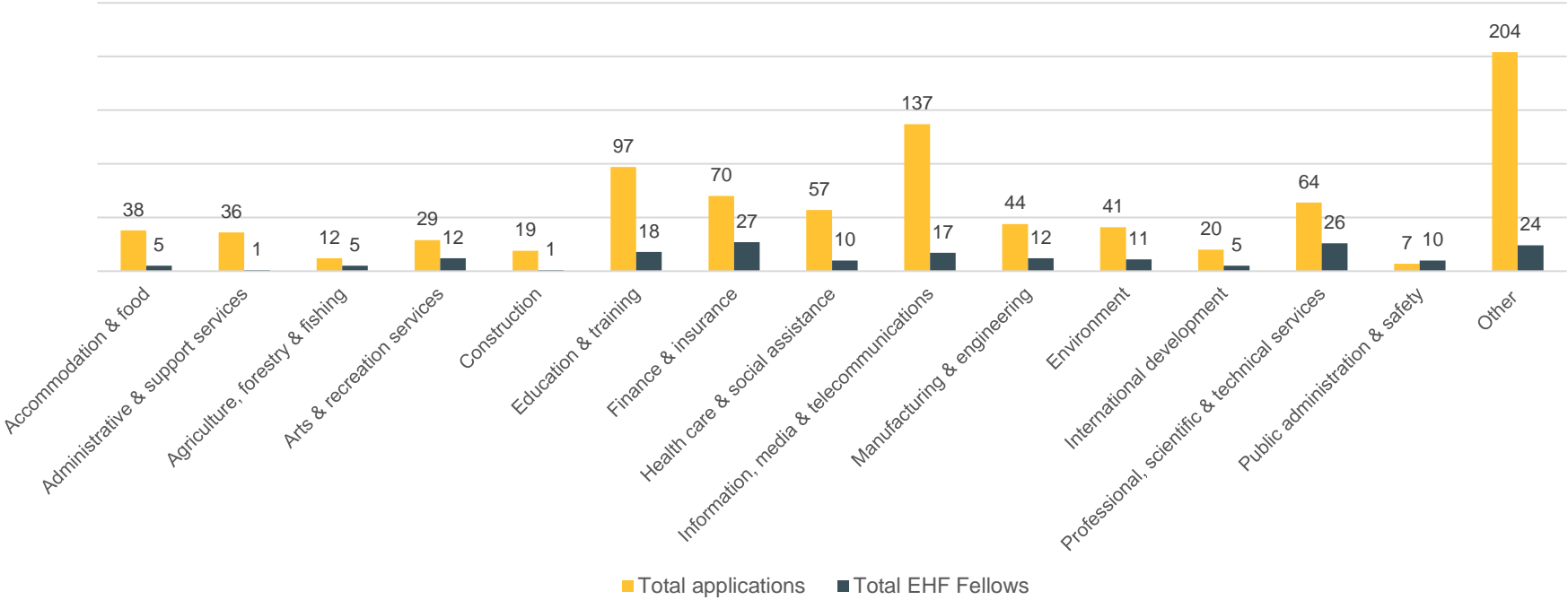
Figure 21 gives further insight into industries, comparing the industries of all applicants to the industries EHF Fellows work in. Most applications submitted fall under the industry category “Other” (204 applications), followed by Information, Media & Telecommunications sector (137) and Education & Training (97).

More than one third of applicants working in sectors Finance & Insurance and Professional, Scientific & Technical Services have been accepted as Fellows.

Figure 22, over page, shows industry breakdown for selected International Fellows compared to NZ Fellows. Across both analyses (applicants compared to selected Fellows, we find no noteworthy changes in the patterns compared to in the Year 1 report.



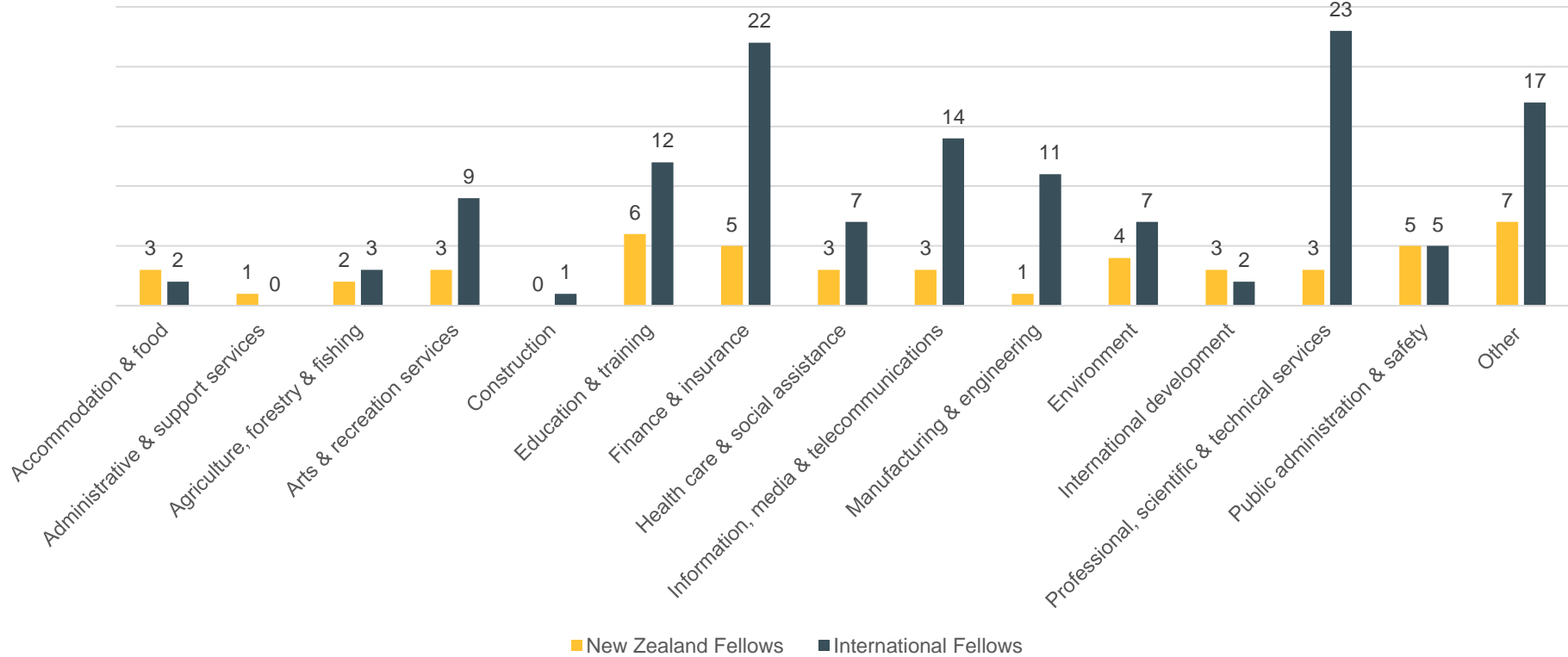
**Figure 21: Industry – applications v EHF Fellows (cohorts 1-5)**



Source: Data set 2, EHF supplied data; applications data for Cohorts 2-5, Fellows' industry data for Cohorts 1-5.



**Figure 22: Industry – International Fellows v New Zealand Fellows, Cohorts 1-5**



Source: Data set 2, EHF supplied data



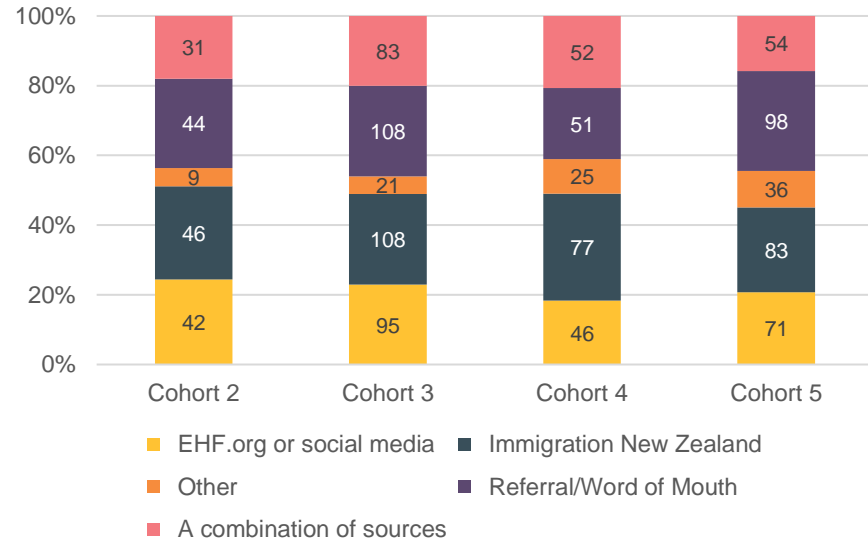
## What attracts applicants to the pilot?

The following section draws on EHF data and feedback provided by Fellows in surveys and interviews.

### Applicants hear about the GIV from a range of sources

INZ and word of mouth / referrals are the most important attraction sources for all cohorts. The EHF website (ehf.org) and social media was the third most important source of information about the Fellowship for Cohorts 2 and 3. Many applicants heard about the Fellowship from a combination of sources (see Figure 23 for details).

Figure 23: Attraction sources for GIV applicants



Source: Source: Data set 2, EHF supplied data

The data captures how International Fellows first heard about the GIV attraction source data was not collected for Cohort 1. Cohort 2 n=214, Cohort 3 n=510, Cohort 4 n=251, Cohort 5 n=342.

### Attraction of the EHF Fellowship

The reasons for applying for the EHF Fellowship relate to the unique nature of the fellowship offered, but also to the fact that it provides an opportunity to immigrate to New Zealand and live here.

#### *Joining a community of like-minded individuals*

Most Fellows find the philosophy of EHF attractive, which they describe as creating a community of like-minded individuals looking for ways for improving the future of the world.



*The EHF program represents a special ecosystem that provides support and collaboration for potentially high-impact ventures to succeed and flourish. These ventures also represent positive contributions for humanity's betterment. [Fellow]*

*EHF appeared to me to be one of the most genuine programs of brilliant motivated people trying to make the world a better place. [Fellow]*

### **Fellowship focused on social impact**

Fellows are drawn to the unique nature of the EHF Fellowship that is focused on impact and specifically goes beyond economy and business by emphasising social and environmental outcomes.

*Through multiple visits to New Zealand and attending New Frontiers, I was able to connect with and understand the EHF Fellowship vision, and meet the people and existing Fellows involved. This convinced me of its impact and potential for the future. The focus on really delivering positive social and environmental impact, but ALSO importantly honouring Maori and indigenous wisdom attracted me to apply. Not just another Silicon Valley style fellowship. Not only technology, but also other relevant impact projects. [Fellow]*

*EHF priority is impact and this is unique since I am a social impact entrepreneur. It is not only about business is about changing lives for better, such theme is absent in most of the business fellowship I had. [Fellow]*

### **Opportunity to access diverse extended networks**

The wide range of networks that can be accessed and connections that can be activated through the Fellowship is highly valued by the Fellows.

*[EHF has] got a different group of people than I'm currently connected with involved. I'm excited to bridge communities, and grow the network of people who I'm supporting, and who are supporting me. I'm also excited about being able to connect people working on similar things, and to be connected. [Fellow]*

*Had already decided that New Zealand was an interesting place to create a new venture. However, moving to a new place without a deep network was a detractor. The EHF program gives a ready-made network of people that someone like me can jump right into. This lowered the risk of the move and the venture tremendously. This ready-made network is proving to be as valuable as I hoped. Most of my new connections, including those into the Maori community, have come from this network. [Fellow]*

### **High quality and diversity of Fellows**

The high quality of Fellows selected and their diversity in terms of experience (levels), expertise, industry sectors and background are attractive factors for new Fellows.

*I experience EHF as a unique confluence of entrepreneurs, tech, indigenous culture and earth wisdom. The EHF community includes visionaries and enablers along a level of enthusiasm and activation that seems capable of generating solutions from Aotearoa to the world. [Fellow]*

### **Enhancing impact**

Many Fellows feel that the unique environment created in the EHF Fellowship will help them to enhance their potential and impact in terms of the scale and scope of their work (eg to grow it internationally).

*[...] the program sounded like an amazing opportunity to extend myself, my goals, and my business potential. [Fellow]*

*The potential of being able to work with values-aligned people, and move some bigger wheels than I could do alone. [Fellow]*

### **Opportunity to live and work in NZ**

Many Fellows appreciate the Global Impact Visa that is a part of the Fellowship as it allows them to live and work in New Zealand. This is linked to appreciating New Zealand's enabling and inspiring innovation ecosystem, political leadership, peace and stability, beautiful land and people.



*New Zealand have been always in my mind as a place that I want to live and work in. The previous visa types were difficult to obtain, but the GIV one was a perfect choice that with my abilities and work experience I can apply for. EHF Vision was one of my main reasons to apply. The EHF network and connections that is vary between economic development, tech Eco system, governmental, investors, and the highly talented world wide entrepreneurs... all of this is the perfect innovative environment that I want to be part off. The EHF is different from any other fellowship I was part off. The diversity of experience levels, sectors, industries, countries that the fellows represent is unique. [Fellow]*

## **The GIV is enabling access for International Fellows, some of whom wouldn't otherwise come to New Zealand**

Around a third of International Fellows (18 out of 55, 33% [survey]) appear to have been positively enabled to choose New Zealand by the GIV. Of these:

- 11 hadn't previously considered NZ
- 7 had considered NZ but weren't eligible for other visas.

However, more than a half (32 out of 55, 58%) *may* have come through another route if the GIV hadn't been available – saying they would have considered coming to NZ and might have been eligible for a different visa.<sup>26</sup>

Half of the International Fellows (28 out of 55, 51% [survey]) had been considering moving to another country instead of New Zealand. The reasons given for choosing New Zealand instead are outlined below.

### ***The opportunity presented by the Fellowship***

Survey respondents and interviewees consistently emphasised the opportunities the Fellowship presents. Respondents were attracted by the

EHF fellows' community and the support it provides and by the fellows' networks and opportunities they would be able to access.

*The network and support of EHF was critical. I've been coming to New Zealand for years but the fellowship turned an interest in to a permanent relationship. [Fellow]*

The fellows especially valued the visa support available through the fellowship.

*The EHF support and wide network, the Education Eco-system, the business potential, the opportunity for the family as my husband can have access to work visa, and my kids will get access to student visa so it is fully supported to my whole family unit as well. [Fellow]*

### ***Opportunity to live in New Zealand***

The opportunity to come to New Zealand was the next most often mentioned reason, including being able to make a positive contribution to the country. Many outlined a respect and appreciation for Māori culture, open and stable society, family-friendliness, community and collaborative feeling, good work-life balance, welcoming nature of New Zealanders and the natural beauty of the country.

*I was already looking at New Zealand as an option, mostly because of the ecosystem created by Enspiral and EHF, as well as nature and the connection to the Maori culture. Being approved to join EHF made my decision a lot easier since it's bringing forth one of the most important factors for me: a community of entrepreneurs with shared values and intentions, plus the visa support. [Fellow]*

*Once we (as a family) decided our work/venture wasn't location bound, we ran a data-centered exercise to evaluate where is the best location to do it from. This involved a deep discussion of all the factors we valued, ranging across strong rule of law, low corruption, stable government, stable*



*currency, strong business environment, education system, healthcare, strong gun legislation, general school safety, traffic, weather, natural beauty, ability to hire people locally, and much more. Then we built a data model and gathered as much high-quality data as we could. Wellington NZ came out at the top. [Fellow]*

### **Opportunity to contribute to New Zealand's innovation ecosystem**

As well as being attracted to New Zealand and appreciating being able to live here, many Fellows acknowledge being specifically attracted to New Zealand for its innovation ecosystem. They see New Zealand's business environment as progressive, open and tech friendly. Some of the Fellows already had a start-up or business here and wanted to keep it in the country.

*New Zealand has developed an extraordinary reputation for its progressive business ecosystem and innovation along with a very attractive lifestyle and environment to live within. [Fellow]*

*New Zealand has the fertile soil to try to make the changes I believe we need in this world. [Fellow]*

## **About the application and selection processes**

In Year 2, we find that application and selection processes continue to be robust and transparent. International and NZ Fellows rate processes very

favourably (see Figure 24),<sup>27</sup> and only four selected Fellows were later denied a visa when due diligence checks were completed.

- 95% (74/78) Fellows (survey) rated the availability of quality information about the EHF Fellowship as *good* or *very good*, and 91% (71/78) Fellows rated robustness of the selection process as *good* or *very good*.
- Availability of information about New Zealand and about the GIV were also rated particular highly (rated *good* or *very good* by 53/55 and 50/55 International Fellows respectively).

We also find that the processes are well integrated and 'smooth' from the applicant point of view, to the point where several Fellows do not distinguish between applying for the Fellowship and applying for the GIV.

The area of least satisfaction continues to be financial cost:

- 11%, 9/79 Fellows rate financial cost of the application for the EHF Fellowship as *poor*
- 3/55 International Fellows rate financial cost of the application for the GIV as *poor*.

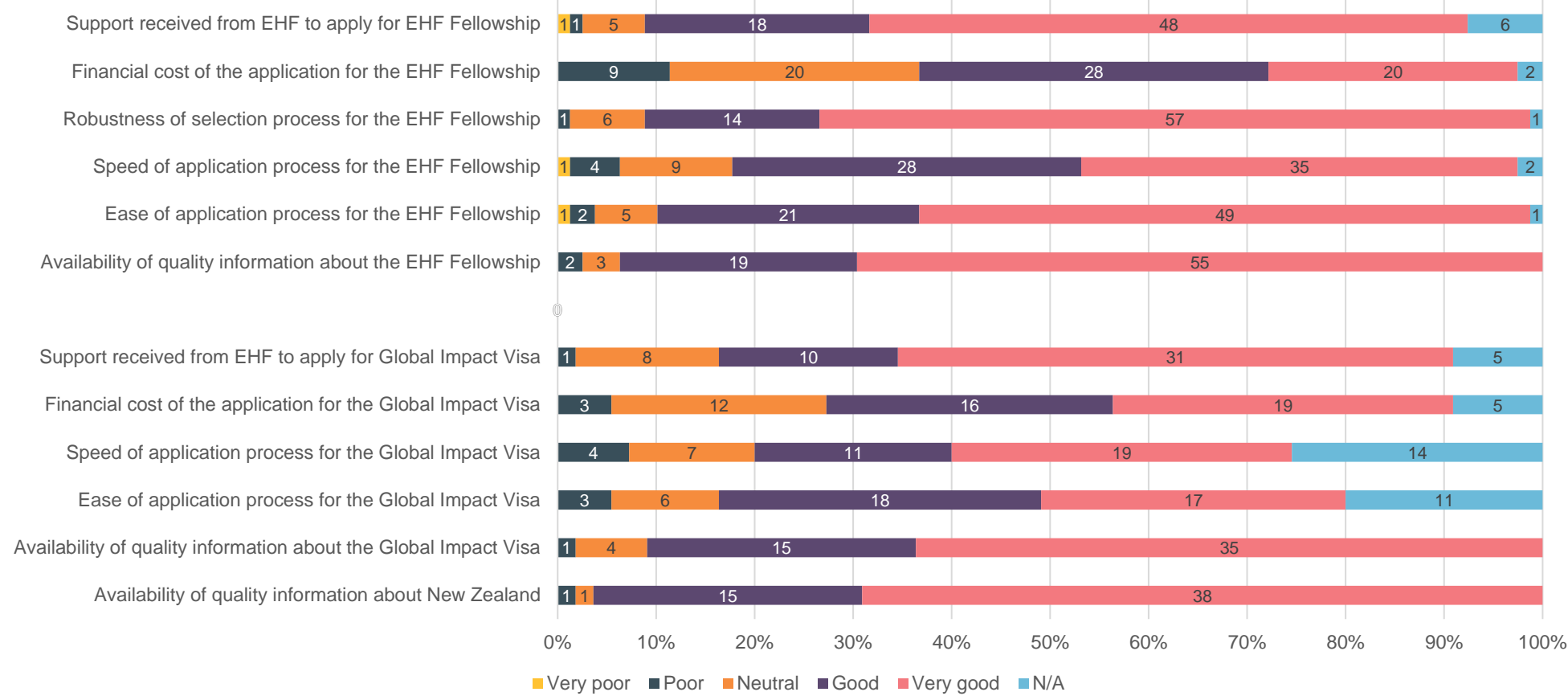
Costs associated with the pilot have increased significantly for applicants and selected Fellows in Year 2 (see page 28 of the report for details).

<sup>27</sup> The ratings are consistent with the last year survey: the responding Fellows ranked exactly the same aspects as very good or poor with similarly large majority.





**Figure 24: EHF Fellows' rating of aspects of the EHF Fellowship and GIV selection and application processes (Cohorts 1-6)**



Source: Data set 4, MartinJenkins Fellows survey, n=79 for questions on EHF Fellowship, n=55 for questions on the GIV.



## What is good about the application and selection process?

### For the EHF Fellowship

Fellows generally agreed that the selection process had been robust and thorough, if a little resource intensive. They particularly valued the amount and the depth of the interviews, which served as a two-way conversation through which candidates could increase their understanding of the Fellowship as well.

*The way the process progresses, requesting more information as the applicant proceeds to the next phase (or not), and the interviews followed by the Cohort in NZ are, in my opinion, possibly the best selection process I have ever experienced before, as it has the real ability to select the best candidates by assessing their real capability to innovate and propose interesting ideas. [Fellow]*

The Fellows appreciated how comprehensive the interviews were and that they focused not only on the achievements, but largely on personality of the applicant.

*It is very thoughtful selection process that focused on the potential, the personality, the expected impact that can be created by the fellows and their vision on how to do it. But also the selection process considered the previous achievements of the applicants as an indicator for their potential especially that the ecosystem and network that previously they operated through could be completely different from the fully supported network and environment that they will have access to when they will come to NZ. [Fellow]*

The process was well organised and managed and ran smoothly and professionally. The Fellows emphasised the use of technology that worked well and made the process very efficient.

*I love that it is largely online and streamlined to be efficient and effective. [Fellow]*

*It's very well run. It makes me jealous that there is a country in which civil society and the government can work so closely together! [Fellow]*

The Fellows found the process very transparent and clear thanks to the abundance of well structured information online (including videos), responsiveness of the EHF team and support by the community of Fellows.

*Communication of where we were at in the process and what to expect when was excellent. This made the process a lot easier and removed a lot of potential stress. [Fellow]*

*The EHF alumni community, and their willingness to answer questions and provide support. [Fellow]*

### For the GIV

The International Fellows were impressed with the transparency, simplicity and speed of the visa application process. The possibility to communicate with Immigration New Zealand in person was especially valued.

*The GIVs application was clear and straightforward, so much easier and less stressful than my previous visa applications. [Fellow]*

*I felt incredibly well treated and welcomed by New Zealand Immigration throughout the entire process. [Fellow]*

## What is not good about the processes?

The only items that received notable negative feedback in the survey were the financial cost of the application for the Fellowship (9 out of 79 Fellows ranked it poor). The Fellows find that the high cost of application put off potential applicants (especially those who do not have established businesses) and may impact diversity of applicants / Fellows (see page 25 of the report).

A minority of survey respondents were concerned about the resource intensiveness and the length of the selection process, while they admitted that this may be necessary for the rigorous vetting of candidates.



A similar small number of survey respondents found the quality of information that was available to them during the selection process poor or confusing, which resulted in a lack of transparency.

*Length of time from start to finish is too long. The process and metrics could be more transparent in the early stage. [Fellow]*

*Some of the information communicated was unclear and seemed to be in flux of changing. [Fellow]*

Several Fellows pointed out that, specifically, the information on the Fellowship and expectations/ requirements of Fellows are vague and that the denomination "Fellowship" may be misleading.

*For a results-oriented, experienced professional, the EHF charter, scope and agenda feels quite nebulous and still in the formation stages. [...] It feels a bit like a "club" that people in the know understand but is challenging for an international outsider to grasp. [Fellow]*

*EHF had marketed itself as a community builder and incubator, but really turned out to be a network - a very valuable at that, but I perceived their communications to have overpromised on what they actually offered. Whenever I mention that I received a Fellowship, but had to pay for it, I get sceptical feedback. And then need to argue that what I actually joined is a very innovative visa programme and a network. I believe the word Fellowship is misplaced and misleading. [Fellow]*

Some Fellows noticed inefficiencies in the application/ selection process, like repeating questions, inability to refer to answers between different technological tools used, lack of information about available scholarships for Fellows, very short deadlines for response/ provision of documents for applicants.

Several Fellows feel that there is not enough (gender) diversity throughout the selection process.<sup>28</sup>

*They are weak on gender diversity at all points in the selection and application process. [Fellow]*

*Potential for biases, lack of clear criteria, lack of diversity in the selection panel. [Fellow]*

One Fellow noticed difficulties when applying as a team:

*Applying as a team was a little challenging / unclear at times. eg some forms were gear towards individual applicants, and we had to jam 2 peoples contributions into a word limit. This didn't feel particularly fair. - at other times it was hard to see where which person should write, or how to active the "multiple applicants" mode - making a 3 minutes video (or whatever length) was similarly really hard with multiple people. [Fellow]*

Regarding the visa application process, most International Fellows bemoaned the slow communication, long waiting time to get the results and difficulties with the availability of a medical certificate. Several International Fellows found that the information on the visa application was not clear, visa information by EHF and MBIE was different or information was not presented on the website in a clear way. It was also suggested that EHF should not accept people in the Fellowship who cannot obtain a visa.

<sup>28</sup> Note that the final selection panel currently has two women and one man

